EUROPEAN FEDERATION OF JOURNALISTS *and*
EUROPEAN DIVISION OF THE MEDIA AND ENTERTAINMENT INTERNATIONAL, EURO-MEI.

MAPPING CHANGES IN EMPLOYMENT IN THE JOURNALISM & MEDIA INDUSTRY

***Final Report:** Changes in employment in the journalism & media industries in the UK and France*[1]

IFJ FIP IJF

European Federation of Journalists

EFJ

UNI europa media, entertainment & arts

UNI global union

MAPPING CHANGES IN EMPLOYMENT IN THE JOURNALISM & MEDIA INDUSTRY

Changes in employment in the journalism & media industries in the UK and France[1]

Final Report

31 August 2012

[1] In this document, the terms 'UK' (the United Kingdom of Great Britain and Northern Ireland) and 'Great Britain' should be understood as equivalent. The EFJ affiliated union in the UK, the National Union of Journalists (NUJ), also represents Irish members in the Republic of Ireland as well as English, Welsh, Scottish, and Northern Irish members living and working in Continental Europe. We have not excluded such individuals from the research. The term 'France' should be understood to refer to mainland France and Corsica. Where individuals living or working in other Francophone and non-Francophone countries have responded to the survey, we have not excluded their responses nor have we excluded non-Anglophone respondents to the English- language survey. In all cases, the figures are small and we have taken their responses into account in preparing our conclusions.

CONTENTS

EXECUTIVE SUMMARY

"Unions need to adapt to meet the dramatic changes within the media - this almost certainly means reviewing membership requirements, and learning to organise internationally and across different sections of the evolving media. It means communicating more effectively with members, targetted non-members, and each other."

- The media industries in both France and the UK are highly centralised and concentrated on the capitals of each country.
- France has a much smaller media sector, which is actually more centralised, than the UK. By any figures, the French media sector employees just over half the number of workers as the UK sector.
- The French newspaper industry is focused on regional titles and regional ownership. National newspapers dominate the UK industry while local newspapers are almost all owned by a handful of national or international companies.
- The larger French media companies (for example, Lagardère and Vivendi) are more horizontally integrated than the larger UK companies, with the result that they tend to be more aggressively globalising.
- A handful of "mega-media giants" dominate the media industry globally. They include Lagardère, Vivendi, Bertelsmann, News Corporation, Disney and Time-Warner. They all have interests in a number of different areas and go through waves of diversification and conslidation typically driven by periodic need for finance.
- There is no classification for the media sector or media industries in any common industrial classification system and the use of "pseudo-classifications" such as "creative industries" and "cultural and creative industries", although helpful to governments, makes it harder to define the media for the purpose of analysis.
- Successive French governments have been active in promoting cluster development (the idea that certain privileged industries should be concentrated in particular geographic areas) but have been less committed to the development of clusters for "creative industries" than in the UK.
- In practice there are few new "spontaneous clusters" in either the UK or France, of the type that have in the past developed around the movie, IT, fashion and newspaper industries. Clustering is increasingly driven by the demands of planning authorities or property developers.
- Favourable tax regimes have played a major role in developing media activities in France and the UK, notably movies and games, while ideological commitment to markets can hinder media development with the result that jobs migrate to other parts of the world.
- Media companies in the UK have been active in adopting multi-media and multi-platform working and UK media workers seem to be more experienced in these areas than their French counterparts.
- Media workers in both France and the UK work on average in 2.5 different task areas in every job.
- Freelance workers accounted for 40% of our UK survey respondents and 50% of our French survey respondents. Global figures indicate that about a quarter of all workers in the media are freelance, although some estimates suggest as many as a third of workers in the creative industries are freelance. For France and the UK this is between two and three times the proportion of freelances in the workforce as a whole.

- Social media marketing and SEO marketing within the media are more highly developed in the UK than in France.
- According to our survey, a third of media workers in both the UK and France work on websites at least for part of the time.
- Union membership within France as a whole is comparatively low at an estimated 9% of the workforce, and media unions tend to concentrate on a small number of major employers. In the UK union membership is an estimated 29% of the workforce.
- Non-union workers tend to be paid less within the media, particularly at the lower end of the pay scale.
- Non-union workers tend to be younger than unionised workers and have worked for less time in the media. In other respects, their work situations are similar.
- In the UK, non-union workers are more likely to be highly educated than unionised workers; in France they are less likely to be highly educated.
- In the UK, non-union workers are more likely to be employees than freelances; in France, they are more likely to be freelance or pigiste than employees (but freelancing in France is far more secure than it is in the UK).
- In both countries, non-union workers are more likely to work for smaller private sector companies than unionised workers.
- Between a third and a half of non-unionised media workers in the UK and France would join a union if they needed help or were approached and asked to join. There was little hostility to unions although a significant number of UK respondents felt that unions were irrelevant to freelances.
- Over 70% of media workers in our survey joined a union because they believe in the aims of unions. The second most important reason was to improve wages or working conditions.
- Nearly three-quarters of our survey respondents received work-related training in the last five years in both the UK and France - mostly provided by employers or clients in both countries, although the state plays a singificant role in France. Union-provided training accounted for less than a fifth of all responses in both the UK and France.
- Most media workers in the UK and France believe the internet has had “an enormous” impact on their work or professional life and is seen as more significant than any other comparable factor from technological convergence to the current economic crisis.
- A small number of our respondents worked in games or apps, but they reflected the character of those industries: geographically dispersed, highly mobile, employing very few freelances, feeding a global market, and closely connected to other media.
- There was a widespread feeling among union activists that media unions should make efforts to appeal to younger workers and those working in less traditional forms of media.
- Unions need to adapt to meet the dramatic changes within the media - this almost certainly means reviewing membership requirements, and learning to organise internationally and across different sections of the evolving media. It means communicating more effectively with members, targetted non-members, and each other.

THE PROJECT

BACKGROUND AND AIMS

The project was launched towards the end of 2011 by two European union federations, the European Federation of Journalists (EFJ) and the European division of the Media and Entertainment International, EURO-MEI. The EFJ and EURO-MEI are subsidiaries of two global unions representing journalists and media workers respectively: the International Federation of Journalists (IFJ) and MEI, which is itself part of Union Network International (UNI).

The partnership between these two organisations reflected the realisation that the media industries (or, at least, employers within those industries) increasingly gloss over the historical distinctions between journalism and the creation of content for any and all mass market communications technologies - often referred to as "platforms". This has happened largely because new technological developments, based on the application of digital electronics, have had a unifying effect on communications media, so that the production and distribution of content now takes place with little or no regard to the platforms on which that content will be communicated.

This has had the effect of transforming jobs in journalism and the media. Traditional roles and practices have disappeared. Many workers in these areas have had to learn new skills, and job descriptions have acquired a sometimes disturbing fluidity. Print journalists learn to make video for a website; broadcasters must think in terms of producing a website, tweeting, and creating a Facebook page, as well as making a TV or radio programme; authors become involved in developing a video game; sound engineers need to know how to upload a podcast to a website. You may have the same job as you did last year, but now you have a new set of responsibilities. Meanwhile, entirely new roles, practices and skills develop with alarming rapidity and while old jobs and enterprises disappear, new ones are constantly emerging: social media marketer, database journalist, game designer.

The project's goals are set out in its original work programme:

"The project shall identify where new jobs are being created, how the nature of employment relations is characterised and how media workers and journalists that evolve in these new jobs can be organised by carrying out a survey based on two test countries, Great Britain and France. It further seeks to inform affiliates of EFJ and EURO-MEI and to develop joint actions, recommendations on recruitment and representation in the media and journalism sector by organising a seminar for EFJ and EURO-MEI affiliates."[2]

[2] *The project work programme, October 2011*

METHODS

The work programme established the methods which would be used for the project. We undertook a considerable amount of desk research, interviewed or surveyed members of the project's steering group from affiliate unions in the UK and France, and carried out a survey of media workers and journalists in two languages - English, aimed at respondents in the UK, and French, aimed at respondents in France. The English-language questionnaire form for the preliminary surveys and interviews is reproduced in Appendix A. The survey questions, answers and notes are reproduced in Appendix B. On 10-11 May 2012, the EFJ and EURO-MEI held a seminar in Brussels with about 40 delegates from affiliate unions throughout Europe at which the preliminary findings of the research were presented. Workshop sessions and plenary meetings discussed the findings and raised a number of issues which fell broadly into three categories: the transformation of the media and journalism industries; the responses of workers within these industries; and the problems confronted by unions when organising within these industries. The

The conclusions of this meeting, which involved delegates from EFJ and EURO-MEI affiliates from across Europe[3], were fed back into the preparation of this document. Clear differences emerged among delegates during the meeting relating to the pace of change in different countries and the jobs of different delegates who divided roughly into those working in a technical capacity and those working content production. Even in the case of content producers, there seem to be differences between those who worked within the distinctive journalistic areas of news and current affairs and those who worked in more market-driven areas of content creation. These differences were already clear from the interviews and the surveys we undertook. Within the context of a turbulent media environment, the terrain for the central task of recruitment for media unions is clearly uneven and strewn with obstacles.

[3] *Delegates from unions representing journalists or other media workers in countries including the UK, France, Spain, Germany, Hungary, Estonia, Italy, Greece, Finland, and Croatia were present.*

PRELIMINARY SURVEY

The surveys of journalists and media workers were developed after interviewing or surveying representatives from EFJ and EURO-MEI affiliates and following consultation with officials from the EFJ and EURO-MEI. The officials, who must be thanked for their contribution to this work, were Marc Gruber of the EFJ and Johannes Studinger of UNI Europa. The representatives of the affiliates who were interviewed or responded to the survey we sent out were:

UK

- NUJ (Donnacha Delong, freelance journalist and President of the NUJ)
- BECTU (Luke Crawley, Assistant General Secretary of BECTU)

FRANCE

- SNRT-CGT Audiovisuel (William Maunier, technical executive at France Télévisions, Secretary General of SNRT-CGT and President of EURO-MEI)
- SNJ-CGT Broadcasting (Jean-François Téaldi, senior reporter with France Télévisions, President of the "intersyndicale" at France TV, and Secretary General of SNJ-CGT Broadcasting)
- SNJ (Olivier Da Lage, journalist with Radio France Internationale, National Council Member of the SNJ and Vice President of the IFJ)

Perhaps most significant result of the initial survey of affiliates was to demonstrate that French unions seem more concerned about the future than UK unions. This has much to do with local factors - French media companies such as Lagardère and Vivendi have been relatively successful in the global environment, and in some areas (notably, the regional press) have stronger local roots than in the UK.

France's regulatory framework is also more rigorous than the UK's, where the market self-regulation dominates the thinking of politicians from all major parties. Although in crisis, the French media economy may be more resilient because it has been less exposed to predatory global companies than the UK's.

The initial survey also made us aware of the different contexts and circumstances under which the unions we focused on were operating. Such conclusions helped us develop a larger survey of workers in the British and French journalism and media industries. This second survey was able to acknowledge important differences between the countries and within the occupations covered by our investigation.

MAIN SURVEY

The main survey was widely distributed in order to get information from as wide a range of sources as possible. The draft survey was modified after consultation with the EFJ and EURO-MEI and after informal discussion with a range of contacts.

The survey questionnaire comprised 34 questions covering personal information, employment and employers, work responsibilities, trade union membership, training and views. We uploaded the questionnaire to Survey Monkey's French and English-language sites (http://www.surveymokey.com and http://fr.surveymonkey.com in early March 2012 and ran the survey until August). Invitations to respond were e-mailed (in the appropriate language) to members of the participating unions and were circulated by e-mail, Twitter in English and French, Facebook in English and French, and LinkedIn in English and French. Table 1 lists those who were consulted during the preparation of the questionnaire and all the means we used to publicise it. Our aim was to get both union members and non-members to complete the questionnaire, and we calculated that the best way to reach non-members was to use social media. To this end, we focused on Twitter and LinkedIn (both of which have British and French organisations as members and relevant English language and French language groups). We also contacted all the UK and French affiliates using organisational and personal contacts and, where possible, French and English language Twitter acounts.

Unions

- EFJ
- EURO-MEI
- BECTU
- NUJ
- SNRT-CGT
- F3C-CDFT
- FASAP-FO
- SNJ
- SNJ-CGT
- USJ-CFDT

Facebook

- The NUJ Facebook group
- Individuals (eg. Gary Herman, Marc Gruber)

LinkedIn

- The NUJ
- BECTU Members UK
- Formation et Journalisme Multimédia
- Journalist & Journalism
- Media & Entertainment
- Professionals
- Media Professionals
- Worldwide
- Professionnels: cinéma, musique et télévision
- Profession Pigiste

Personal emails

- Lawrence Shaw, NUJ
- British Interactive Media Association
- Online Publishers Association (Europe)
- TIGA (UK Games Industry Trade Association)
- AFJV (French Games Industry Trade Association)
- Periodical Publishers Association
- UK Association of Online Publishers
- Susan Collard, Sussex University
- Patrick Kamenka, a former SNJ-CGT secretary general
- Sylvie Strudel, (Tours University and Sciences-Po Paris)
- Jean-Michel Demetz, deputy foreign editor, L'Express
- Sabine Delanglade, Les Echos - the Union des Clubs de Presse de France

Mailing lists

- Geekup
- NUJ New Media
- NUJ Cowherds (Freelances)
- NUJ National List

Twitter accounts

- @LawrenceShaw
- @NUJBirmandCov
- @ShropshireNUJ
- @bristolnuj
- @journalism_news
- @holdthefrontpage
- @NUJ_NEW_Media
- @SYNJournoUnion
- @NUJ_PRmembers
- @NUJ_Leeds
- @NUJ_LFB
- @NUJScotland
- @NUJPhoto
- @nujbrighton
- @NUJMcrSalford
- @NUJofficial
- @USJCFDT
- @FASAPFO
- @FOFASAP
- @F3cCFDT
- @Mediapart
- @Rue89
- @twitter_fr
- @CGTRadioFrance
- @SNJ_national
- @Ginades
- @Bectu
- @Mashable
- @Pressgazette
- @CFPJMedias
- @Atelier_medias
- @uk_media

Table 1: *Groups and individuals consulted and/or used to publicise the main survey questionnaire*

The total number of respondents was 731, which broke down as shown in Table 2.

	Number	%
UK *(this refers to those who filled in the English-language questionnaire)*	563	77%
France *(this refers to those who filled in the French-language questionnaire)*	168	23%
Of whom, working outside UK or France	91	12%
Union members	486	66%
Of whom, members of EFJ affiliates	147	20%
Of whom, members of EURO-MEI affiliates	307	42%
Of whom, members of other unions	32	4%
Non-union members	132	18%
Membership unknown	113	16%

Table 2: ***Respondents***

The responses are set out in Appendix B, with notes, and the results are analysed in the section of this report titled 'Analysis'. Throughout the report, we have rounded percentage figures up or down to the nearest whole number. The slight inaccuracies introduced are more than offset by the increased clarity.

THE ENVIRONMENT

THE MEDIA INDUSTRIES (UK & FRANCE)

One of the central problems in developing a strategy for union engagement with the media industries is to determine precisely what those industries are. We could have started with an empirical definition of "media" which embraced those enterprises engaged in what might be described as "value-added communications", were it not for the fact that Value-Added Communications is the name of a US company whose main business is the provision of telephone services to prison inmates.

To be fair, when most of us use the word 'media', there's an implied prefix. We mean "mass media", or "means of communication that reach large numbers of people, such as television, newspapers, magazines or radio", as defined in Collins Concise English Dictionary (a definition, incidentally, used in a report to the EC on the problems of defining the media market for the purposes of regulating competition in "information, communication and multimedia"[4]). Some people further refine that definition to add the stipulation that media must "reach large numbers of people in a short time". But it's not a very useful definition - particularly when it comes to "new media" and the "long tail phenomenon", which suggests that many new media products are characterised by attentuated life-spans and high degrees of personalisation.

Nevertheless, the EC report cited above also notes that the media sector "is concerned with the production and distribution of information on a one-to-many basis"[5].

This observation needs unpacking. It asserts that the media sector involves "information goods"; that they must be distributed on a one-to-many basis; and that they must be distributed using a medium[6]. This seems to exclude telephone calls which are typically - but not necessarily - one-to-one, and possibly live music and theatre performances which do not require a medium other than air and space. But, such questionable exclusions apart, the observation is less than clear. It may be easier to list the kinds of jobs (and by implication employers) that interest the EFJ and EURO-MEI: journalists, authors, editors, photographers, designers, illustrators, radio and TV production staff, film-makers, anyone involved in producing recorded music, websites, books, magazines, CD-ROMs, DVDs, video games, smartphone or tablet apps, and so on. Everyone covered by such a list is engaged in the production and distribution of what is increasingly called "content".

In the modern, digitised, world content production and distribution will probably (although not inevitably) involve the use of digital technology, and we can draw a neat dividing line between those who use software tools to do their work producing and distributing content and those who make the tools. Happily, this solves the demarcation problem between technology jobs and media jobs which continues to trouble journalism and media unions.

In brief, the media industry - in terms of processes which, of course, translate into jobs - looks like this:

1. Creating technologies for the production and distribution content

2. Using technology to produce content

3. Using technology to distribute content

The first item on this list is outside our remit, since it is one remove from content, but once we have accepted the defining notion of content, we can in a sense dispose of the idea of the media altogether. In fact, the word has latterly acquired an association with the news media which is difficult to shake off. Increasingly, economists and politicians wishing to discuss markets and policy refer to "creative industries", "cultural industries" or "creative and cultural industries". These concepts are, in their own way, no less problematic than "the media", but they help us to connect with contemporary economic and political ideas and frameworks.

4 *Market Definition in the Media Sector - Economic Issues,* ***Report by Europe Economics for the European Commission, DG Competition, 2002***

5 *ibid.*

6 *Economist Hal Varian defined "information goods" in 1998 as including anything that could, in principle, be digitised - Varian is now Google's chief economist, which tells you a lot about that company's strategy. The very fact of digitisation supports the notion that*

CREATIVE INDUSTRIES

The term "creative industries" is increasingly dominant in academic studies and policy documents. It is widespread in current industrial/economic classifications for a variety of reasons, among which probably the most important are:

1. the fact that conventional approaches to productive activity and wealth break down in economies which are increasingly focused on exchange value not use value, and on immaterial rather than material production

2. the idea that, in the discourse of "the post-industrial society", creativity is considered the main source of future economic growth and, more particularly, that creative activity can drive the regeneration of depressed inner city areas

The term "creative industries" itself is probably descended from "cultural industries" (more correctly, "the Culture Industry"). This concept dates from 1944 and the critical theory of the Frankfurt School. The culture industry was described by Horkheimer and Adorno "as an instrument of the capitalist elite that deprives both artist and the work of art of its intrinsic artistic value and that transforms the consumer to a pseudo-individual"[7]. Importantly, it prefigures a concern with globalisation - in particular it embodied a notion of American cultural imperialism which was frequently resisted in Europe. In economic and political discourse the idea of a global "Culture Industry" ultimately inspired the introduction of policies directed at developing local, regional or national "creative and cultural industries" and, more recently, just "creative industries". By 1980, Unesco had started to use the term "cultural industries" while the UK and France adopted the terminology a few years later.[8] In 1988 came an influential report in which the author calculated that arts enterprises in regional economies ("museums and galleries, theatres and concerts, creative artists, community arts, the crafts, the screen industries, broadcasting, the art trade, publishing and the music industries") generated additional employment by a factor of two to three.[9]

The first appearance of the concept of "creative industries" has been dated to 1994 in Australia, when the Keating government produced a cultural policy under the banner "Creative Nation". In Europe, the term probably dates from 1997, when the new Labour government in the UK set up a "Creative Industries Task Force" to help promote economic development. From our point of view, the concept has become instrumental to contemporary industrial policy in the developed world, in line with the crude distinction between different stages of economic development. According to this distinction, there are economies that produce raw materials, economies that produce goods, economies that produce services, and economies that produce intellectual property. In the original BRIC classification of emerging economies produced by Goldman Sachs in 2007 (on the back of an envelope, one might imagine) Brazil and Russia produced raw materials, China manufactured goods, and India supplied services. The US, no doubt, had all the intellectual property. As a report to the UK Government's Department of Culture, Media and Sport (DCMS) notes: "The common denominator of the creative industries is that all - to a greater or lesser extent - use copyright in their business model. Indeed some American commentators refer to the 'copyrightable' rather than the creative industries."[10]

However much we disagree with the wisdom of a globalised economy, both France and the UK have accepted the significance of developing their creative sectors but, importantly, in quite different ways and with quite different emphases. This has significant implications for emerging areas of the creative industries.

> *"The common denominator of the creative industries is that all - to a greater or lesser extent - use copyright in their business model."*

[7] **Max Horkheimer & Theodor Adorno,** *The Culture Industry: Enlightenment as mass deception, in Dialectic of Enlightenment: Philosophical Fragments,* **Amsterdam, 1944/1947**

[8] **Katia Segers and Ellen Huijgh,** *Clarifying the complexity and ambivalence of the cultural Industries,* **Centre for Media Sociology Working Paper, VUB, Brussels, 2006.**

[9] **John Myerscough,** *The Economic Importance of the Arts in Britain,* **Policy Studies Institute, London 1988**

[10] **The Work Foundation,** *Staying Ahead: The economic performance of the UK's creative industries,* **London, 2007**

The category of creative industries (or industry) is somewhat fuzzy. In the UK, the Government defines creative industries as "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of economic property". Based on the Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC), the definition is said to include 13 areas of economic activity:

- Advertising
- Architecture
- Art and antiques
- Crafts
- Design
- Designer fashion
- Film and video
- Interactive leisure software
- Music
- The performing arts
- Publishing
- Software and computer services
- Television and radio

These are not the same as the industries covered by the word "media", nor are they completely consistent through time. Since the definition's original formulation in the DCMS's 2001 Creative Industries Mapping Document, significant changes have been made. For example, in the 2011 Creative Industries Economic Estimates, DCMS notes that computer consultancy and software development are no longer included in the classification, while newspaper printing and pre-press and pre-media services have been added to it.

Although the DCMS definition has been widely adopted, other governmental departments and agencies, such as Creative and Cultural Skills, one of the UK's training agencies, use other definitions. CCS defines "creative and cultural industry" to include "advertising, craft, cultural heritage, design, literature, music, performing arts and visual arts" (in a 2006 document, Creative Choices). This list misses out major activities such as film and video, television and radio and publishing (the responsibility of another training agency), while it includes cultural heritage. This leads to conflicting statistics.

"There is no mention of the word culture in the British definition, even though there is undeniable cultural content in the output of most of the 13 industries included under the creative industry classification" according to a paper presented to a conference held at the Musée du quai Branly in Paris in 2008. "In most continental European countries, on the other hand, there is an inclination towards greater stress on the cultural content of creative production."[11]

A French definition describes creative industries as a "a set of economic activities that ally conception, creation, and production functions to more industrial functions of manufacturing and commercialising at large scale, through the use of material supports or communication technologies."[12] Included in this definition, according to a European Commission analysis, are:

1. Publishing (book, newspapers, magazines and periodicals, music) as well as trade in books, sound recordings and press

2. Audiovisual activities (production of films for television, production of institutional and advertising films, production of theatrical films, technical activities related to cinema and television, theatrical film distribution, video publishing and distribution, theatrical film exhibition, radio, production of TV programmes, TV channels, editing, distribution of radio and TV satellite package programmes)

3. Directly related activities (press agencies, multimedia, advertising)

The list emphasises the production and distribution of traditional copyright works and is more tightly bound to what we have described as "media" than the DCMS list. In practice, it makes sense to use a single standard. We have adopted the classification used by Eurostat, the EU statistical office:

1. Advertising
2. Artistic and literary creation
3. Museums and the preservation of historical sites and buildings
4. Other
5. Printing and publishing
6. Radio and television
7. Retail and distribution
8. Software

We have been selective with this list and focus on items 1, 2, 5 and 6. This is because figures may not exist for other categories, they are not well-defined ("retail and distribution", "software"), they are not relevant ("museums"), or all three ("other"). But it is also because Eurostat itself tends to aggregate certain activities according to the NACE ("Nomenclature statistique des Activités économiques dans la Communauté Européenne") sectoral classification adopted by the EU (Table 3), which does not correspond to the UK's SIC

[11] **David Throsby,** *From Cultural to Creative Industries: the Specific Characteristics of the Creative Industries,* **Paris, 2008**

[12] ***Département des Études, de la Prospective et Statistiques, Paris, 2006***

J - INFORMATION & COMMUNICATION

- J58 - Publishing activities
- J58.1.1 - Book publishing
- J58.1.2 - Publishing of directories and mailing lists
- J58.1.3 - Publishing of newspapers
- J58.1.4 - Publishing of journals and periodicals
- J58.1.9 - Other publishing activities
- J58.2.1 - Publishing of computer games
- J58.2.9 - Other software publishing
- J59 - Motion picture, video and television programme production, sound recording and music publishing activities
- J59.1.1 - Motion picture, video and television programme production activities
- J59.1.2 - Motion picture, video and television programme post-production activities
- J59.1.3 - Motion picture, video and television programme distribution activities
- J59.1.4 - Motion picture projection activities
- J59.2.0 - Sound recording and music publishing activities
- J60 - Programming and broadcasting activities
- J60.1.0 - Radio broadcasting
- J60.2.0 - Television programming and broadcasting activities
- J61 - Telecommunications
- J61.1.0 - Wired telecommunications activities
- J61.2.0 - Wireless telecommunications activities
- J61.3.0 - Satellite telecommunications activities
- J61.9.0 - Other telecommunications activities
- J62 - Computer programming, consultancy and related activities
- J62.0.1 - Computer programming activities
- J62.0.2 - Computer consultancy activities

M - PROFESSIONAL, SCIENTIFIC & TECHNICAL ACTIVITIES

- M73 - Advertising and market research
- M73.1.1 - Advertising agencies
- M73.1.2 - Media representation
- M73.2.0 - Market research and public opinion polling
- M74 - Other professional, scientific and technical activities
- M74.1.0 - Specialised design activities
- M74.2.0 - Photographic activities
- M74.3.0 - Translation and interpretation activities
- M74.9.0 - Other professional, scientific and technical activities nec

TABLE 3: *The NACE classification (potentially relevant categories)*

or the UN's ISIC "standard industrial classification" systems with any degree of exactitude. According to one report, "the UK has the largest creative sector in the EU, and relative to GDP probably the largest in the world .... The creative and cultural industries play an increasingly important role in economic life. They account for 7.3 per cent of the economy comparable in size to the financial services industry. They employ 1 million people themselves, while another 800,000 work in creative occupations."[13]

These figures are at the top end of the estimates for the size of the sector and do not seem to correspond to most other estimates of the size of our media industries - which tend to be broadly in line with the EU's estimate of around 750,000.

The problem stems from the variety of different methods for estimating the size of the creative industries - WIP (the World Intellectual Property Organization) for example includes so-called "core copyright industries" (music, theatre, film and video, radio, TV, software and databases, design, architecture, photography, advertising, visual and graphic arts, performing arts and heritage) as well as related hardware manufacture, distribution and retail (this covers everything from CD players to musical instruments and paper) and "support industries" (transport, repair, telephony, internet services and so on). This vastly overestimates the size and significance of the creative industries. For most purposes, within Europe the creative industries are taken to cover all forms of publishing, broadcasting, video and film, video games, and music. We have also included advertising (including PR and marketing), because this is an area that involves core skills like writing, photography and design which are central to both cultural practice and membership of our unions, and is increasingly inseparable in practice from cultural production and distribution.

[13] *The Work Foundation, op.cit.*

CLUSTERS AND CREATIVE INDUSTRIES

We know a fair amount already about how the creative sector is developing in France and the UK from surveys undertaken by EFJ and EURO-MEI affiliates and from academic and policy-oriented research. We also know a lot about the way new creative enterprises develop - or are thought to develop. The key concept is that of the business cluster or industrial cluster (roughly equivalent to "pôle de compétitivité" in France). The cluster idea emerges from a combination of zone-based planning strategies and high-profile examples of successful area-based industrial development in recent times such as "Silicon Valley" in Northern California, the Seattle cluster around aerospace, or fashion in Milan. It is relevant to the idea of creative industries because of the commonplace observations that:

- regions with high concentrations of creative and cultural industries have Europe's highest prosperity levels
- large urban areas and capital city regions dominate the creative and cultural industries, but some city regions do better than others. The super clusters London and Paris stand out, followed by Milan and Amsterdam
- the creative and cultural industries are significant generators of intellectual property, in particular copyrights, and the largest creative and cultural industries regions are also among the largest employment centres for copyright-based industries[14]

These observations seem to demonstrate a connection or correlation between the geographical clustering of enterprises and a high prevalence of creative enterprises. They do not demonstrate a causal relationship, however, although another commonplace observation suggests that it is characteristic of creative industries that they involve close collaboration among many smaller-than-average enterprises. This would clearly favour clustering.

The term "industrial cluster" was coined by economist Michael Porter.[15] It is not a very coherent concept and is interpreted and implemented differently in France and the UK, but it gives us a route to unionised and non-unionised firms, through actual clusters typically focusing on cheap centrally-located office accommodation and through virtual clusters based on social media. There are important actual creative clusters in East London, Manchester/Salford, Dundee, Brighton, Bristol and Oxford, and in Paris, le Grand Lyon, Bretagne/Pays de la Loire, and Montpellier.

[14] **European Cluster Observatory,** *Priority Sector Report: Creative and Cultural Industries,* **2010**

What we don't really know is how this works in terms of what might be called "employment support" - jobs created and freelance work generated. This is critical for unions and for government, but because the data is difficult to obtain, it is not often done. There are two methodological issues to consider:

1. Industry clusters can differ in their level of concentration within an area. In the media, for example, manufacturing and production activities (for example, television programme production) tend to be highly concentrated, while distribution and performance activities are diffused[16]

2. Employment figures are complicated by the common failure to take freelances and sole traders into account when compiling statistics and by the so-called "creative trident" effect - the fact that the "creative workforce" consists of creative individuals working in creative enterprises (eg. a newspaper journalist), support staff (eg. secretarial staff in a newspaper) and creative individuals "embedded" in non-creative enterprises (eg. a journalist working in a company press office)[17]

Cluster development is often a feature of regional economic development or urban regeneration policies. But, according to media academic Robert G. Picard, "three primary types of clusters are identifiable: spontaneous clusters, planned clusters, and real estate-driven clusters":

"Spontaneous clusters", writes Picard, "are driven by the needs of large companies within the clusters and the interests of entrepreneurs who found enterprises to serve larger members of the clusters. They are generated without a plan, developing organically, and evolving to serve the needs of members. They are not organized or directed by an administrative organization, but are guided by self interest and pragmatism.

"Planned clusters are created and promoted by some authority, usually by a development agency or industry board, for the specific purpose of promoting industry development, employment, growth, and other economic policy interests. Public and/or private funds and efforts are specifically expended to obtain the benefits.

[15] **Michael Porter,** *The Competitive Advantage of Nations,* **New York, 1990**
[16] **European Cluster Observatory, Priority Sector Report: Creative and Cultural Industries, Brussels, 2011.**
[17] **UK National Endowment for Science, Technology and the Arts,** *Beyond the creative industries,* **Bristol, 2008**

"Real estate driven clusters are created primarily by private interests that acquire and development real estate and market it for particular uses. In the cases of media clusters, buildings in real estate driven clusters are typically constructed with the technical requirements of studios in mind and with extensive information and communication technology infrastructures."[18]

Experience suggests that economic development and regeneration strategies are often poorly disguised forms of property development. Local authorities and regional development agencies are often driven by the need to maximise economic value from land-holdings or vacant buildings. Examples of apparent policy-motivated development schemes which become little more than expensive building projects are legion. In practice, Picard's 'planned clusters' shade imperceptibly into "real estate driven clusters".

This is particularly apparent with media clusters. These usually involve significant expenditure on facilities and infrastructure demanding large-scale private or public sector investment. Jobs may be promised to win the support of local voters which never materialise because the required skills are not available; or aggressive hype is generated to support political vanity projects focusing on "creative cities" or "creative regions" which pay no attention to the actual needs of local people or local businesses.

The recent example of the so-called "MediaCityUK" development in Salford, Greater Manchester, is typical. This development centred on a new studio complex for the BBC, commissioned in 2007 as part of a licence fee settlement with the UK government which required the broadcaster to move a significant number of departments out of London for political reasons. Planning permission for a substantial brownfield site, already sold off by the local authority to a private developer, was obtained largely on the strength of a promise to create jobs for local people. While doing our research, it was announced (in January 2012) that out of more than 600 new jobs created at the BBC studio, 26 (about 4%) went to local people.

In a similar vein, in le Grand Lyon, where central government and the local economic development agency launched a policy in 2006 to create one of the top creative regions in Europe, one interviewee told a researcher a few years later "we are designers in Lyon and we have been here for three years. We are working with firms in Paris but none in Lyon or the greater region - we are not desperate to work with firms in this region".

The two "official" *pôles de compétitivité* in France with an explicit media component - Imaginove (Rhône-Alpes) and Cap Digital (Île-de-France) - seem to have had little effect on the development of the media in their areas. According to their websites, "Imaginove seeks to develop synergies between the different branches of the moving image sector (video games, cinema, audiovisual, animation and multimedia)" while "Cap Digital specializes in the creation, distribution and multimedia exchange of digital content."[19] There is certainly little evidence of their impact in our survey, and our research suggests that the pôles de compétitivité strategy is more of an instrument of interventionist state policy than it is a motor of economic development.

Successful media clusters are usually spontaneous and develop because of contingent circumstances - a university has available incubator faciltities, there is a glut of cheap properties suitable for office use, a large company needs smaller companies to provide ad hoc services. Political vision or opportunism has little to do with it. In London last November, Prime Minister David Cameron spoke publicly about "our ambition ... to bring together the creativity and energy of Shoreditch and the incredible possibilities of the Olympic Park to help make East London one of the world's great technology centres". One of the leading Shoreditch entrepreneurs, Ian Dodsworth of TweetDeck, commented in a BBC Radio 4 interview that "It's a little bit fake to do the Cameron thing; we're here because it's cheap". The UK Government's Department of Trade and Industry (DTI) defines clusters as "concentrations of competing, collaborating and interdependent companies and institutions, which are connected by a system of market and non-market links". But while the UK Government may encourage certain areas of development, it does not as a rule specify them.

Cluster policy in the UK is comparatively de-centralised even though the clusters themselves are not. The initiative for developing clusters was devolved from central government to regional development agencies in the 1990s and, with the demise of the RDAs this year, only Northern Ireland, Scotland and Wales now have regional oversight. The market has assumed a leadership role. In France, by contrast, the Chirac government decided to use state funding to bring public and private players together in specified sectors to strengthen France's competitivity within international markets, and Chirac's successors continue to do so. The approach is to establish co-operative public-private relationships aimed at developing innovative products, stimulating economic efficiency and creating jobs. The intention is to facilitate market dominance, and it has become a central plank of

[18] ***Robert G. Picard,*** *Media Clusters: Local agglomeration in an industry developing networked virtual clusters,* ***Working Paper, Jönköping International Business School, Sweden, 2008***

[19] *http://www.imaginove.fr & http://www.capdigital.com*

French economic policy. But French policy concentrates on its strengths - aerospace, food and agriculture, cosmetics, energy, ceramics. By 2009, 71 “competitiveness clusters” including 5,000 companies had been established across the country (including Guadeloupe, French Guyana and Réunion). Hardly any of them involved creative industries - we’ve only been able to identify a “digital heritage” cluster in Paris and a video games cluster in Lyon. Nevertheless, creative industries are clustered in both France and the UK. The maps below serve as an indicator of creative industry clustering (Fig. 1). They are based on figures relating to employment levels (see Table 4), taken from the EC’s “Cluster Observatory” website. They reveal the enormous degree of centralisation in both France and the UK.[20]

If anything France is more centralised than the UK, with significant employment outside of the Île de France only in the South East around Lyon-Grenoble and between Montpellier and Nice. The UK, which has about twice the French total employment in creative industries by practically any measure, has significant clusters of employment around Leeds-Bradford, Oxford, Bristol, the North West (Manchester-Liverpool) and Brighton.

Unfortunately Eurostat regional data does not produce any reliable correlations for concentration of employment in the media.[21] This is partly to do with the variables measured in Eurostat data (which are generally too broadly defined, so we can find data for employment and unemployment, but not self-employment), partly to do with the problem of classification (once again, media industries do not specifically appear in Eurostat figures), partly because not all significant locations are covered by the data (Oxford and Calais, for example, are not among the “Urban Audit” cities) and partly to do with the fact that the level of employment in the media is clearly dependent on a complex of interrelated factors - for example, population density, educational attainment, availability of finance and transport and communications links are almost certainly all relevant, as are historical factors. Even looking at something as apparently simple as the degree of business specialisation in different regions can be confusing - Eurostat data only reflects the share of employment in a region due to a particular activity, not the absolute level of employment. Self-employment seems at first to be a good indicator for media concentration, if only because the rates of self-employment in London and Paris are higher than anywhere else in their countries (at 16% and 14% respectively in 2006). But it is not really a reliable indicator for media industries, since a moment’s reflection will demonstrate that the London and Paris figures only indicate the general availability of opportunities in large cities for self-employment in all areas of economic activity.

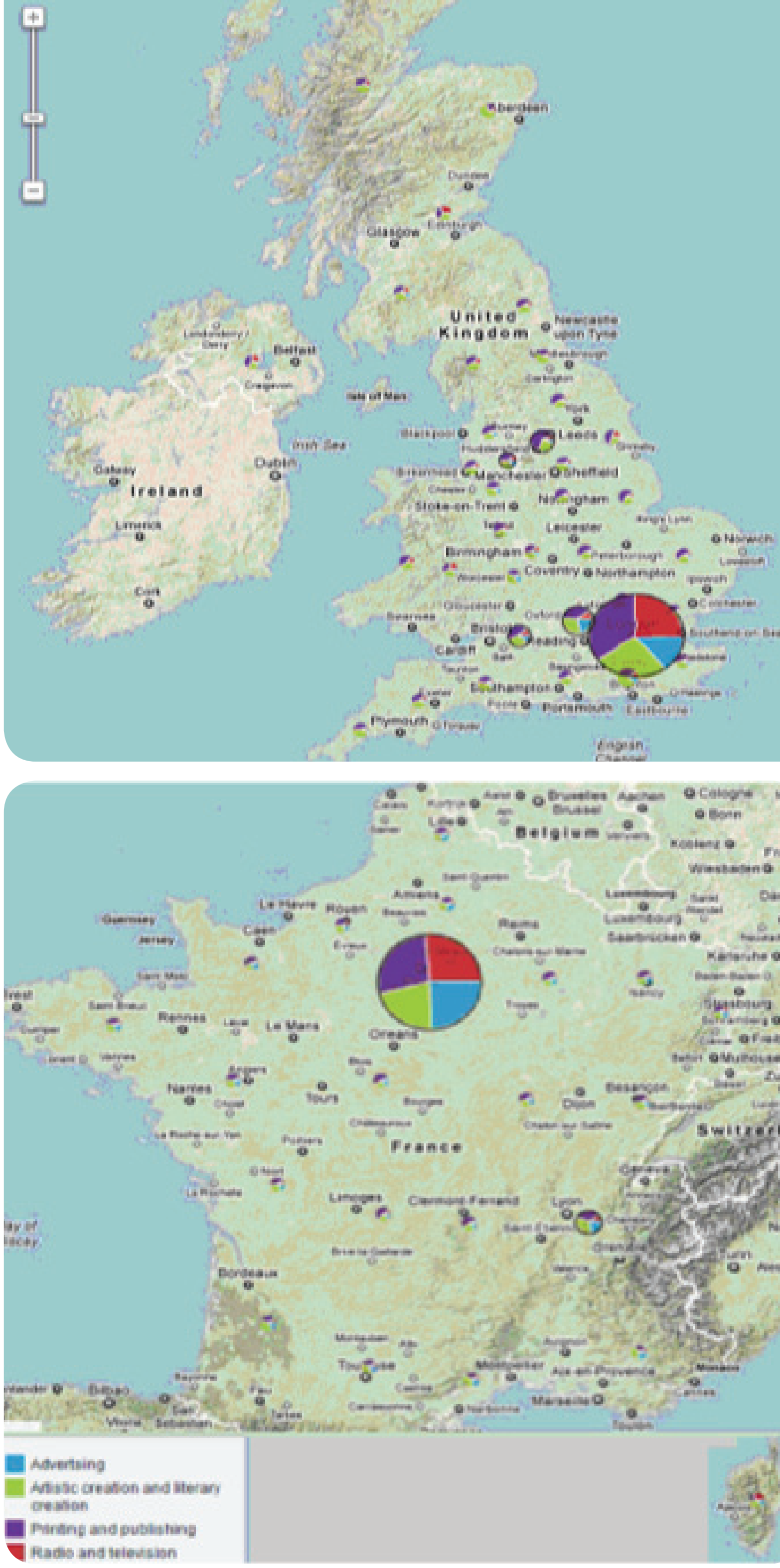

Fig. 1 - Media clusters in UK & France, 2009: area of coloured circle segments represents employment in corresponding sector (source: EU Cluster Observatory, 2012)

[20] http://www.clusterobservatory.eu
[21] http://epp.eurostat.ec.europa.eu/portal/page/portal/publications/regional_yearbook

France Region	Advertising	Art & literary	Print & pub	Radio & TV	Totals ('09)
Île de France	49,171	42,397	56,245	52,578	200,391
Rhône-Alpes	7,596	10,407	11,077	3,355	32,435
Prov-Alpes-Côte d'Azur	6,820	8,192	6,603	2,261	23,876
Nord-Pas-de-Calais	4,847	4,405	7,534	1,414	18,200
Pays de la Loire	3,370	5,118	7,306	1,106	16,900
Bretagne	3,192	4,357	5,964	1,103	14,616
Aquitaine	2,830	4,951	5,048	1,361	14,190
Centre	2,347	2,682	7,336	700	13,065
Midi-Pyrénées	2,698	4,340	4,497	1,158	12,693
Languedoc-Roussillon	2,540	3,735	3,403	994	10,672
Alsace	2,029	2,754	4,140	1,332	10,255
Lorraine	1,835	2,496	4,027	768	9,126
Poitou-Charentes	1,307	2,040	3,017	678	7,042
Basse-Normandie	1,558	1,507	3,494	477	7,036
Haute-Normandie	1,324	2,076	2,590	811	6,801
Bourgogne	1,139	1,756	3,368	487	6,750
Auvergne	961	1,535	3,456	361	6,313
Champagne-Ardenne	1,150	1,231	2,724	446	5,551
Picardie	1,302	1,392	1,663	421	4,778
Franche-Comté	661	1,358	1,713	405	4,137
Limousin	487	843	1,987	398	3,715
Corse	170	300	206	335	1,011
TOTALS	*99,334*	*109,872*	*147,398*	*72,949*	*429,553*
UK Region					
Inner London	24,348	46,797	59,359	44,730	175,234
Outer London	5,965	16,168	19,099	11,330	52,562
Berkshire, Bucks & Oxfordshire	8,139	11,574	14,392	3,829	37,934
West Yorkshire	1,927	7,819	19,675	2,222	31,643
Surrey, East & West Sussex	3,503	14,424	10,446	2,790	31,163
Gloucester, Wiltshire & N. Somerset	3,005	9,458	12,461	3,282	28,206
Greater Manchester	3,748	9,016	9,810	3,507	26,081
East Anglia	2,381	7,632	12,628	2,102	24,743
West Midlands	2,290	8,132	8,476	2,854	21,752
East Scotland	1,212	5,862	7,343	7,185	21,602
South West Scotland	2,266	7,077	7,766	3,164	20,273
Hampshire & Isle of Wight	1,259	7,135	9,304	1,524	19,222
Bedfordshire & Hertfordshire	2,155	6,869	7,927	1,302	18,253
Leics, Rutland & Northamptonshire	1,198	5,611	9,659	837	17,305
Derbyshire & Nottinghamshire	918	5,983	9,035	1,233	17,169
Kent	1,560	5,479	7,647	1,209	15,895
Essex	956	4,655	9,193	894	15,698
Hereford, Worcester & Warwickshire	2,154	5,357	4,752	767	13,030
Northumberland & Tyne & Wear	879	4,551	5,763	1,315	12,508
East Wales	1,019	3,977	3,623	2,734	11,353
Cheshire	1,484	4,378	4,672	519	11,053
Lancashire	1,281	3,242	5,259	578	10,360
Dorset & Somerset	867	4,398	4,250	696	10,211
Northern Ireland	686	2,640	3,990	2,404	9,720
Devon	765	3,685	4,149	1,106	9,705
Shropshire & Staffordshire	591	3,383	4,396	942	9,312
Merseyside	580	3,706	4,003	974	9,263
West Wales & Valleys	309	3,137	4,101	1,200	8,747
North Yorkshire	456	2,788	4,790	528	8,562
South Yorkshire	710	3,365	3,253	719	8,047
North East Scotland	143	4,417	1,398	485	6,443
East Riding & North Lincolnshire	265	1,570	3,030	1,225	6,090
Tees Valley & Durham	311	2,488	1,720	421	4,940
Lincolnshire	217	1,315	2,800	362	4,694
Cornwall & Scilly Islands	296	1,923	1,869	292	4,380
Cumbria	55	1,052	1,125	358	2,590
Highlands & Islands	151	998	978	322	2,449
TOTALS	*80,049*	*242,061*	*304,141*	*111,941*	*738,192*

Table 4: *Media employment 2009 by region and activity (source: EU Cluster Observatory 2012)*

	France	UK
Population in millions (2011 OECD)	65	62
Land area (km2) (Varies according to (eg) overseas territories, habitable land only)	674,843	244,820
Population density (per km2)	96	253
Urbanisation (% population in densely urbanised areas, 2009 Eurostat) (ie. UK more concentrated)	46	67
Total employment in millions (2011 OECD) (Eurostat 2011: 25/29 (resident employees))	28	32
% employed (2011 OECD) (Eurostat 2011: 64/70 (age group 15-64))	43	50
% employed in agriculture (2011 OECD)	4	2
% employed in industry (2011 OECD)	24	19
% employed in services (2011 OECD)	72	80
% of workforce with tertiary education (2011 OECD, 2008 Browne Report)	26	32
% of workforce in union membership (2011 OECD)	9	29
Working time to buy car (2011 OECD, hours)	1,600	956
Working time to buy TV (2011 OECD, hours)	22	28
Working time to buy beef (2011 OECD, minutes)	82	52
% workforce who work > 40 hours/week (2011 OECD)	21	50
% non-employees (self-employed, employers or unemployed) in creative industries & all industries (2002 Eurostat) **	20 / 9	28 / 11
% non-employees (self-employed, employers or unemployed) in all industries (2007 Eurostat) **	10.8	13.4
% self-employed (2007 Eurostat)	5.8	10.2
% family workers (2007 Eurostat)	0.6	0.3
% employers (2007 Eurostat)	4.4	2.9
GDP/hr worked: normalised to purchasing power €(Eurostat 2009)	42	39
GDP per capita €(IMF 2011/Eurostat 2009)	32,462 / 29,600	29,634 / 25,300
Employed in Creative Industries (2009 OECD)	429,253	738,192
Employed in Cultural Industries (2002 Eurostat)	434,000	877,100
% employed in creative industries (OECD 2011/Eurostat 2009)		
(part-time employment in cultural sector 25% (19% overall))	1.5 / 1.7	2.3 / 2.1
% graduates in creative industries (2002 Eurostat)	51	43
Internet users (European Journalism Centre 2007 in millions)	31	40
Facebook users (European Journalism Centre 2008 millions)	4	20
Twitter users (European Journalism Centre 2008 millions)	0.13	2.60

Table 5: *Country profiles with special reference to creative industries*
(sources: OECD, Eurostat, European Journalism Centre, IMF, Browne Report)

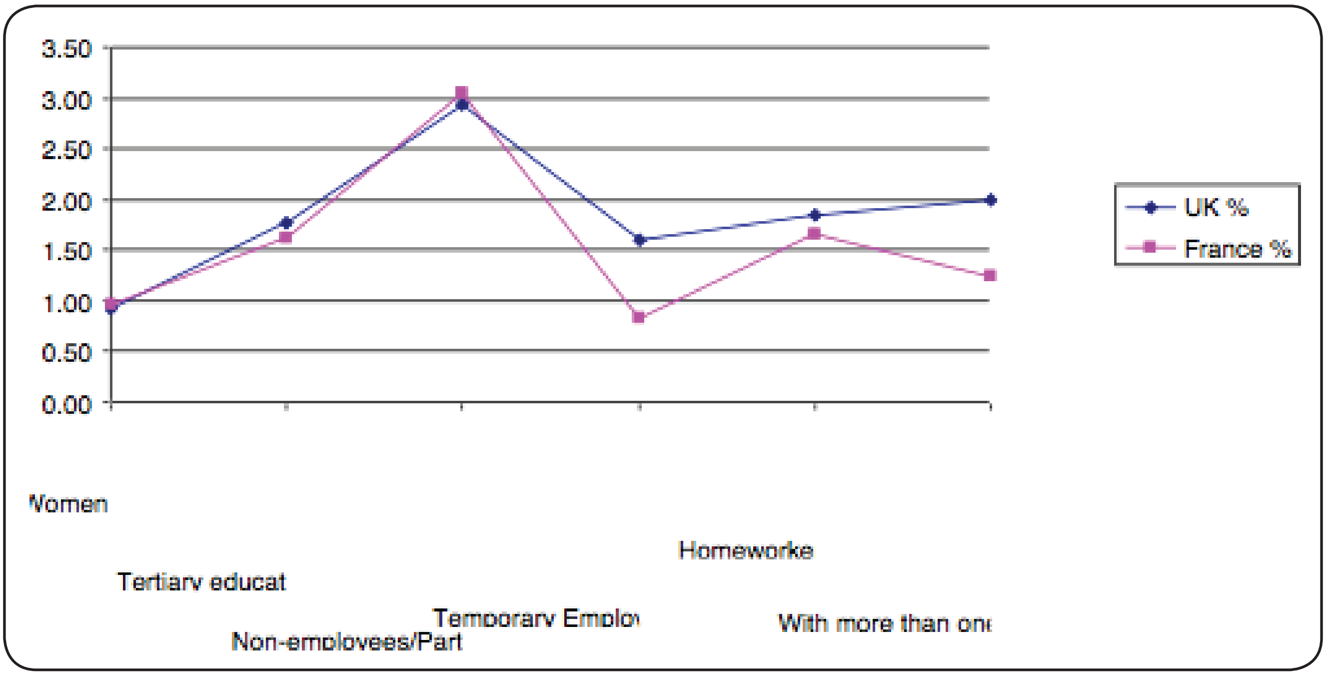

Fig. 2 - Characteristic of media workers (% media workers / % population). Source: Eurostat 2011

Despite the reality of globalisation, there are obvious differences in the economic, social and political characteristics of France and the UK which affect the way in which creative industries grow, develop and operate. Table 5 above shows country profiles for the UK and France. These demonstrate that the UK population is substantially more concentrated in urban centres and, using different sets of figures, support the EU Cluster Observatory's figures for the size, clustering and concentration of media industries in both the UK and France. From these figures we can derive a reliably trustworthy estimates of the size, composition and location of the media industries in the UK and France. There are approximately 400,000 media workers in France, and 750,000 in the UK. They are concentrated in Greater London and the "Home Counties" in the UK, and in Paris and the Île de France in France. The single most important area of media employment by numbers of workers is print and publishing, representing about 40% of the total in the UK and 34% in France.

It should also be possible to create a profile of centres of media employment, based on the common characteristics of the creative workers and enterprises in media clusters. Such a profile has begun to emerge from our analysis (see Fig. 2). When compared to the population at large media workers are more likely to have tertiary education qualifications, more likely to be self-employed or in part-time employment, more likely to work from home, and more likely to have more than one job. Our survey confirms this picture.

CHANGES IN THE MEDIA INDUSTRIES (1970-2012)

In both the UK and France, similar changes in the structure of the journalism and media industries seemed to take place over this period. Most of these changes were due to two distinct but related causes: the spread of new digital technologies following the miniaturisation and integration of electronic components, and the global political mood for deregulation which took root in the 1980s throughout the developed world.

The changes are characterised by an increasing concentration of ownership within the media; the growth of multimedia conglomerates such as Disney, Time-Warner, News Corporation, Vivendi, Lagardère and Bertelsmann which often encompass publishing, broadcasting, recording, film and video, and new - digital - media; and the incursion of new companies, such as Orange (formerly France Télécom), Bouygues (originally a construction company) and BT (formerly British Telecommunications) into the businesses of producing and distributing content.

In 1990, Greg MacDonald observed that "the [media] industry as a whole is dynamic, volatile, complex and restructuring rapidly. It is catapulting through a technological revolution and undergoing changes in a single decade which have taken several decades in other industries."[22]

[22] **Greg MacDonald,** *The Emergence Of Global Multi-Media Conglomerates, Working Paper No 70, International Labour Office,* ***Geneva, 1990.***

MacDonald noted that "The internationalisation of processes is expected to result in the emergence of roughly six mega-media giants who will dominate the world market by the end of the [20th] century. These would include such groups as Time-Warner, Bertelsmann, Hachette, News Corp, Thomson and Maxwell." Of the six companies mentioned, only three still exist under their original names. Hachette is now a part of Lagardère, Thomson merged with Reuters, shed its conventional media products and became a global services company supplying high value specialist information; and Maxwell is in administration, its publishing operations sold off to a variety of other companies such as Trinity-Mirror. Restructuring of the media industry is a constant phenomenon and proceeds in waves of consolidation and diversification. Perhaps MacDonald's most significant insight was to identify advertising as the "catalyst that drives the growth of the media industry". And this was before anyone had ever heard of Google.

Our interviews and surveys demonstrate that there are distinctive flavours to these developments within the two countries examined in this project. To a significant extent this is a reflection of the relationship between industry and government. The dirigiste aspects of the French state have more-or-less survived the period of free market capitalism's ideological dominance, while the British state has increasingly shed its post-war interventionism and embraced laissez-faire policies. While both countries regulate their media industries and operate rules ostensibly governing the concentration of ownership in the media, cross-media ownership and the acceptable degree of foreign influence within domestic media, the UK regime is less restrictive and has proved to be more flexible than the regime in France.

As a result, in 2011/12 the UK came within a hair's breadth of one foreign-owned company - Rupert Murdoch's US-based News Corporation - controlling over a third of the country's newspaper market and over a quarter of its pay-TV market. Only a scandal of unparalleled proportions put a stop to this. For the last three decades, French governments - whether of the right or left - have intervened vigorously in the development of a competitive media sector, imposing rigorous restrictions on media ownership and even offering $1.5bn of state aid to the ailing French newspaper industry. As William Maunier said in discussing French broadcasting in his survey response:

"Formerly politically controlled by the powers that be (aside from some national newspapers like Le Monde or Libération and some privately held radios like Europe 1) media companies (mainly public) suddenly flourished after the arrival of the left in government in 1981. [23]

"What were known as free radios, for example, breathed some fresh air into the somewhat stuffy atmosphere of the previous years (under President Giscard d'Estaing). Built at the beginning on very simple local bases, they quickly became stronger through syndication and some became big national radios (eg. NRJ).

"As for television, the process came later and was at first more structured around public initiatives such as the creation by President Mitterrand of Canal+, a subscription channel, or the privatisation of TF1 (still the first channel in France) under the government of Jacques Chirac."[24]

With hugely influential media institutions like BBC and strong national newspapers, the UK developed significantly fewer home-grown cross-media or multimedia conglomerates of significant size than France. In the 1980s and 1990s, the drive in France was towards diversification as media companies bought (and sometimes sold) companies in different but related areas. The goal was to increase revenues through expansion. In the UK, the drive was predominantly towards consolidation - mergers and acquisitions were designed to support core activities, not to extend corporate reach, and the motor has been a desire to cut costs and realise economies of scale. As Rita Cruise O'Brien observed in a 1978 report for Unesco "the causes of concentration are only partially competition with other media.... Much more important is rising costs and the structure of profits in the industry." [25]

[23] *When commercial radios were finally allowed by law – translator's note.*
[24] *When he was prime minister from 1986 to 1988 – translator's note.*
[25] ***Rita Cruise O'Brien,** Mass Media Ownership: An analytical summary of transnational and national trends, **The Institute of Development Studies, University of Sussex, 1978***

As Table 6 shows, there is a high level of concentration of ownership in the newspaper business in the UK. A few companies such as News International (a wholly owned subsidiary of News Corp), the Daily Mail and General Trust, Johnston Press, Trinity Mirror, Northern & Shell and Archant account for the vast majority of national and local or regional newspapers. The UK industry is characterised by relatively high sales, a strongly centralised structure, a small number of publishers, and a significant number of global players and foreign owners. The French newspaper industry, by contrast, is characterised by relatively small sales, a strongly regionalised structure, a multitude of comparatively small local and regional publishers, and an almost complete absence of global or foreign owners. State aid is a significant contributor to revenue.[26] In both countries, television is even more concentrated, as shown in Table 7. Four or five companies account for almost all television viewing. Broadcasting is characterised by a considerable amount of cross-shareholding and joint enterprise, but also - thanks largely to the same impulse to deregulate that led to consolidation and concentration of ownership - by numerous independent production companies.[27]

UK				FRANCE			
Title	*Publisher*	*Sales*	*Readers*	*Title*	*Publisher*	*Sales*	*Readers*
The Sun	News Internatiional	2.4m	8.9m	Ouest France	Groupe Ouest France	0.8m	2.2m
Daily Mail	DMGT	2.1m	5.7m	Le Monde	La Vie-Le Monde	0.4m	2.1m
Daily Mirror	Trinity Mirror	1.6m	4.7m	L' Équipe	Groupe EPA	0.4m	2.5m
Daily Express	Northern & Shell	0.7m	2.1m	Le Parisien	Group EPA	0.4m	1.7m
Daily Telegraph	Barclay Brothers	0.5m	2.2m	Le Figaro	Dassault	0.3m	1.4m
Daily Star	N&S	0.7m	1.9m	Sud Ouest	Sud Ouest	0.3m	1.3m
The Times	News International	0.5m	1.6m	Le Voix du Nord	Rossel	0.3m	1.1m
The Guardian	GMG	0.3m	1.1m	Nice Matin	Lagardêre	0.3m	0.8m
The Independent	Independent Print	0.2m	0.6m	Le Dauphiné Libéré	Le Dauphiné Libéré	0.3m	0.8m
Financial Times	Pearson	0.1m	0.5m	Le Progrès	L'est Républicain	0.2m	---

Table 6: *The leading daily newspapers in the UK and France by volume of sales, 2004*[28]

Global deregulation of markets once propelled the growth of global conglomerates, particularly in the media, which offered the benefits of convergent technology and the promise of substantial returns on limited investment. For a variety of reasons, few home-grown media conglomerates developed in the UK. Instead, the market welcomed foreign enterprises such as Time-Warner, News Corporation and Lagardère. Genuine UK multimedia operations are virtually non-existent. But now the trend is, if anything, towards companies narrowing their interests, wherever they might be based. Multimedia conglomerates may soon be a thing of the past.

UK			UK		
Channel	*Owner*	*Audience %*	*Channel*	*Owner*	*Audience %*
BBC 1	BBC *	25	TF1	Bouygues !	32
ITV	ITV plc	23	France 2	France Télévisions *	21
BBC 2	BBC *	10	France 3	France Télévisions *	15
C4	Channel 4 *	10	M6	Groupe M6	13
Five	Northern &Shell	7	Canal +	Vivendi/NBCUniversal/Lagardère	4
Sky one	BSkyB/News Corp !	2	France 5	France Télévisions *	3
ITV 2	ITV plc	1	ARTE	Groupe ARTE #	2

Table 7: *The leading TV channels in the UK and France by audience share (%), 2004*[29]

**Public corporation, ! Majority shareholding, # Joint French/German ownership*

[26] **As a matter of fact, the best-selling daily newspaper in France (in fact, in the entire Francophone world) is a regional title,** Ouest France.

[27] **See the House of Lords:** The ownership of the news, **First Report on Communications, Session 2007-2008.**

[28] Figures - to nearest 100,000 - from the World Association of Newspapers, World Press Trends, 2005. In the last 7 years, circulation has declined in all cases.

[29] **Source: European Audiovisual Observatory**, Yearbook, **Brussels 2005.**

In 2011, Lagardère - a company that grew out of a marriage between a book publishing company (Hachette) and a high-tech manufacturer (Matra) - sold its substantial international magazine business to Hearst Corporation. Vivendi - which started life as a water company - has gradually reduced its involvement in environmental businesses and last year (2011) sold its stake in NBC Universal (now branded NBCUniversal) to Comcast and General Electric. With a net debt of €14bn, the company seems, at time of writing, likely to divide its media and telecoms operations.[30] Even in the UK, the phase of fashionable consolidation and expansion seems to be on the way out. The Guardian Media Group (GMG), for example, recently sold its local newspapers and its network of radio stations (both of which were profitable) in order to concentrate on its - unprofitable - national newspaper and related digital products. ITV, the UK's leading commercial television network, is currently partway through a five year "transformation plan" intended to sharpen the company's focus on its original purpose - broadcast content creation. Similarly, the BBC increasingly concentrates its efforts on its core competences, buying in services as required. This is often called "outsourcing" and can make life very hard for unions - who have to negotiate contracts, wage-levels and conditions in smaller, dispersed workplaces where client companies rather than direct employers often dictate targets, pay rates and, effectively, contract terms.[31]

These developments are clearly connected with the ongoing crisis in the media industry which is witnessing job losses and cuts at an unprecedented level within the established European media industries. But this crisis has a number of causes of which competition from new media is only one. Others include a global recession, longstanding stagnation or actual decline in many parts of the media, rising costs, falling rates of profit, and aggressive competition from conventional or mainstream media companies. But there is room for optimism where businesses can successfully retrench and refocus and where new enterprises can successfully occupy the market niches being left by this process. This was reflected in the relative upbeat mood of the representatives of the UK affiliates we spoke to. The apparently less sanguine mood in France may be partly due to a detectable lag in new media developments in that country, revealed in our survey. The French EFJ and EURO-MEI affiliates saw the crisis still looming, while the UK affiliates believed they could detect a light at the end of the tunnel, despite the atmosphere of economic despondency that seems to have swamped the globe.

There is some evidence from our survey to suggest that, regardless of any differences in their level of development, the journalism and media industries in the UK and France are similarly structured. In Question 20 (Please identify the size of your employer's enterprise) we asked about the size of the organisation in which people worked - large (501 or more employees), small-to-medium (101-500 employees), small (11-100 employees) and small (1-10 employees) - and whether they were in the public or private sector. The responses are dominated by employees of large organisations but the sizes of enterprises are similarly distributed in the UK and France. French respondents were significantly more likely than UK respondents to be employed in a large private sector organisation, and UK respondents were divided equally between public and private sectors, while almost three quarters of French respondents were in the private sector (see Fig.3). (We allocated respondents who identified their employers as third sector or non-governmental organisations into the public sector.) The disparity in the division between public and private sectors may reflect the number of non-union members in the French sample and the number of BBC employees in the British sample.

[30] **James Boxell,** *Vivendi rules out 'straight break-up', The Financial Times,* **London, 30 August 2012.**
[31] **Ursula Huws & Sarah Podro**, *Outsourcing and the fragmentation of employment relations: the challenges ahead, ACAS,* **London, 2102**

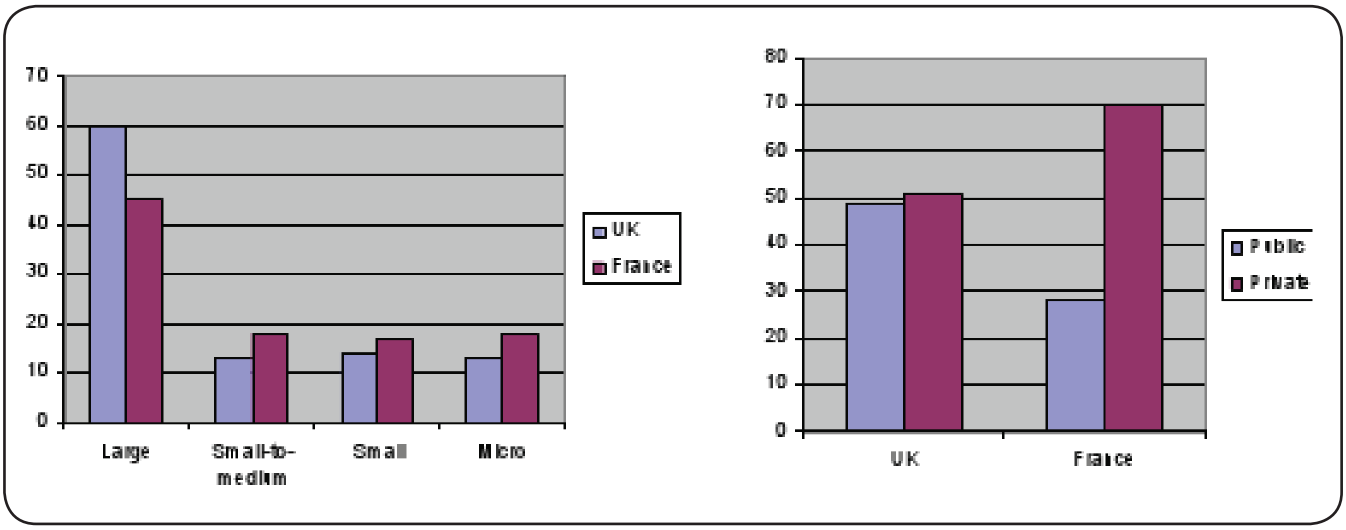

Fig. 3 - Size (left) and sector (right) of enterprises in which respondents work (%). (Source: survey)

In Question 21 we asked "If you work in a group (for example, a production or editorial team), please indicate its size". Half the survey respondents in both the UK and France answered this question and there was a close correspondence between the British and French samples (see Fig.4). This indicates a remarkable similarity in organisational structures - the moreso when the differences in the samples are considered.

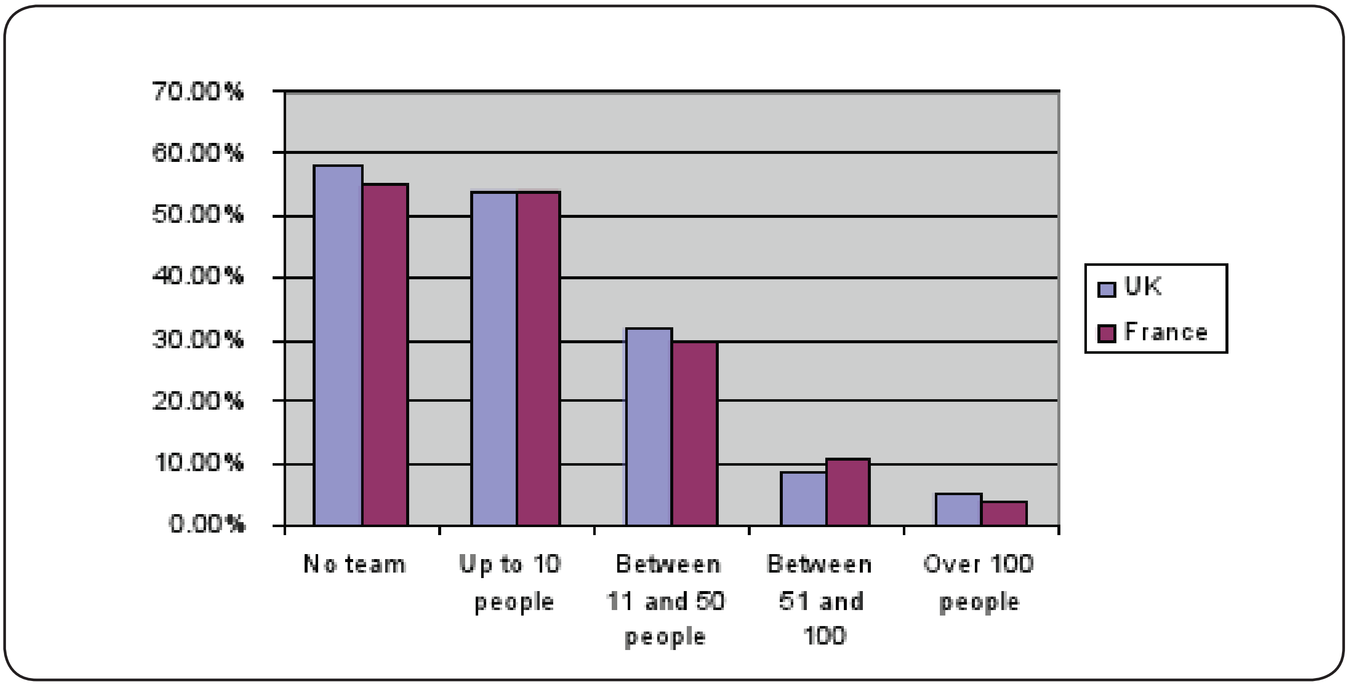

Fig. 4 - Organisation of media industries - team sizes (%). (Source: survey)

CHANGES IN THE MEDIA INDUSTRIES (2012-)

The biggest changes in the media industries are only just beginning. Certain trends have been apparent for some time across the developed world, and they seem to be gaining speed.

The first is the increasing fragmentation and de-skilling of many of the processes and jobs traditionally associated with the media - witnessed in a number of well-known phenomena:

- the growth of blogging and citizen journalism
- "small screen film-making" using cheap video cameras, cheap editing software and "display channels" such as YouTube and Vimeo
- home music and audio production using cheap sound recording equipment and editing software and the growing number of online music stores and audio distribution networks
- podcasting and other forms of narrowcast audio distribution such as internet radio
- ebook writing and self-publishing
- smartphone app development and publishing

Much of this is, in the best sense of the word, amateur. For example, the average ebook author earned $10,000 (£6,375) in 2011, while the median income for ebook authors was less than $500.[32] Little money is to be made from these activities, except by the "content aggregators" like Google, Apple and Amazon whose role is increasingly to "digitise everything", collect it together in the vast server-farms that we dreamily call "the cloud" and either sell it to us or rake in the revenues accruing from advertising which, live performance apart, is fast becoming the only motor of growth in the developing media universe. The emergence of such transnational "content aggregators" is the second trend.

The third trend is the way that traditional media companies can reposition themselves to take advantage of the vast resources of cheap and often shoddy content[33] that is increasingly being churned out by a growing cohort of "anti-professionals". The relationship between these companies and the entrepreneurial individuals and small businesses thrown up by new media opportunities is a critical ground for media unions of the future. The "anti-professionals" may comprise former media workers whose jobs have been "outsourced" or whose companies have been "downsized", genuine enthusiasts with a love for their medium and the skill to produce innovative and exciting work, professionals who have been squeezed out of their chosen medium, or chancers, opportunists and gamblers who cannot resist the lure of a medium whose cost-of-entry is, in historical terms, so low that it might be negligible. For the big publishers like Bertelsmann's Random House or Lagardère's Hachette, movie studios like News Corporation's 20th Century Fox, and major record companies like VIvendi's Universal Music Group, the internet has become a proving ground for product they knew nothing about, a useful adjunct to - perhaps even a replacement for - expensive talent scouts and marketing departments. Newspapers hire bloggers who are dedicated enough to build a following, major publishers sign-up authors whose ebooks have touched a nerve, You Tube hits generate global advertising campaigns.

For unions, this is difficult territory, but there are areas for productive intervention. At an event for European bloggers held under the auspices of the EU MediaAct project[34] in July 2012, participants from the UK, France, Germany, Austria and Norway - most of whom were practising bloggers with a focus on the media industry - discussed the issue of regulatory mechanisms for blogs and online media, the need for international communication in a world of global media, and how media freedom might be underpinned by national and transnational organisation and solidarity. These are all issues which journalism and media unions should be concerned about, highlighted in recent months by the dramatic events surrounding the Leveson Inquiry in the UK and raising questions about how journalism and media unions of the future should engage with the processes of content production and distribution to fulfil their primary function of protecting the livelihoods of workers in the media.

[32] ***Dave Cornford & Steven Lewis,*** *Not a Gold Rush, The Taleist Self-publishing Survey,* ***Sydney, 2012***

[33] *Along with the tendency towards what journalist Nick Davies has called "churnalism", it is noteworthy how new media tend to undervalue old professional skills such as sub-editing and copy-editing. The Taleist self-publishing survey, for example, found that only 29% of ebook authors engaged copy editors to check their texts.*

[34] *MediaAct is a 42-month "comparative research effort on media accountability systems (MAS) in EU member states as indicators for media pluralism in Europe" involving 11 European partners and two countries from the Arab world (Tunisia and Jordan). It has been funded under the EU's seventh Framework programme - http://www.mediaact.eu.*

This means addressing a number of issues that reflect the trends we have identified:

1. The fragmentation and de-skilling of processes and jobs traditionally associated with the media

2. The emergence of transnational "content aggregators" like Google, Apple and Amazon

3. The exploitation of entrepreneurial individuals and small media businesses by traditional media companies

In the face of these developments, the journalism and media unions of the future must increasingly focus their efforts on building regional and global co-operation within the media, promoting quality content and ethical, technical and professional standards, and protecting the intellectual property, droit d'auteur and contractual rights of the new breed of content producers and distributors.

There is fourth trend, not touched upon above, and that is the increasing involvement of more-or-less conventional telecommunications companies such as BT and Orange in the delivery of media content. This is really little more than an expression of long-established technological and market convergence. In a digital age, telecommunication companies - or "telcos" - are little more than "conveyors of data". As such, they are naturally placed to challenge traditional media companies who frequently do much the same thing. Some data has a higher value than others, by virtue of its desirability and complexity - movies, TV programmes and books, for example - and it has long been recognised that conveying this sort of data can be more profitable than conveying telephone calls, if it can be packaged by the telco. "Content," as the familiar motto has it, "is king". This explains why media companies rarely, if ever, seek to own their infrastructure. Telcos - particularly the larger ones - are increasingly transforming themselves into retailers of high-value data. So the media landscape of the future may include individual and small-scale "content creators" and publishers, established media conglomerates, "content aggregators" and telcos.

For unions, telcos present an interesting problem. Most of them - particularly in Europe - have emerged from the public sector where they have traditionally employed unionised workforces. But the unions concerned are not usually those who represent journalists and media workers. Nevertheless, there is a certain fuzziness around the edges of the jobs involved, and media unions - particularly those with members involved in technical areas of work - are undoubtedly interested in recruiting is these enterprises. According to our preliminary survey and interviews with EFJ and EURO-MEI affiliates, not much thought has yet gone into how such activity might be negotiated with established telecommunications unions, but it would seem that negotiation will be essential.

THE EMERGENCE OF NEW BUSINESSES: COMPUTER AND VIDEO GAMES

There are three main issues when considering the computer and video games sector (CVG) - also referred to as "interactive entertainment":

- Government statistics for CVG usually include it in a wider category of software or software and computer services. This tends to substantially overinflate the significance of CVG in statistics covering the creative industries.
- Technological change in CVG is so rapid that it is often difficult to identify the industry at all. For example, in only a year or two the dominant area of CVG has become smartphone games. In June 2012, the Los Angeles Times reported that console game sales fell by 16% year-on-year in the previous month, with sales of consoles and peripherals themselves declining by 23%, while online and mobile games "exploded".[35] Mobile games were a type that barely existed when most of the available statistics for the creative industries were compiled.
- The sector has reached a stage of consolidation, particularly in the once-dominant area of console-based games (focused on the Playstation, X-box and Nintendo Wii platforms). The companies producing these games are increasingly being bought up by global conglomerates with operations in many countries. This makes it difficult to measure their contribution to national economies.

Analysts and commentators are agreed that CVG is a significant area of the creative industries and one that our unions should engage with. Luke Crawley, BECTU's Assistant General Secretary, commented in our preliminary research that BECTU seeks to recruit in the industry by attending "games events" (exhibitions and conferences) and publicising the union in appropriate publications (games magazines are one of the minority of areas in which print publications are doing well). It has become commonly accepted that the CVG sector globally is now bigger in terms of turnover than the movie industry. This may not be true when all film distribution channels are taken into account - TV, DVD and online, as well as conventional theatrical release - but it does indicate the growing importance of games.[36]

Our survey results show only 17 people for the English language questionnaire - just over 3% of the total - and two people for the French language questionnaire - just over 1% of the total - working in online apps[37]and games, and one person in the English-language questionnaire working in disk-based games. The one person working in disk-based games can be ignored (they objected to some aspects of the survey and consequently failed to answer all questions truthfully). The respondents working in online apps and games (taken together) were based in the locations shown in Table 8.

REGION	No.
Greater London	6
North West	6
North East	1
South West	1
South East	1
West of Scotland	1
North East Scotland	1
Ireland (Eire)	1
Brussels (English language respondent)	1
Pays de la Loire	1
Languedoc Rousillon	1

TABLE 8: *Respondents in online apps & games*

These are obviously very low responses, indicating that we failed to reach enough people working in these areas or, more likely, that we failed to persuade people working in the CVG sector to answer the survey. However, the locations are interesting and appear to reflect actual centres of the games industry. The UK responses may be particularly useful in this respect. According to a report by the UK media industry training agency, Skillset, "Amongst the Computer Games workforce just one fifth (19%) is based in London. The Computer Games workforce is distributed across the other nations and English regions with significant proportions in North West (30%), the East of England (18%), the East Midlands (8%) and Scotland (7%)." These figures need to be compared to the figures in Table 9 below which suggest a significant disparity in measurement.

*[35] **Alex Pham,** Video game sales might not be as bad as they appeared in May, **Los Angeles Tomes, 15 June 2012***
Estimates in 2009 suggested an annual revenue from US CVG sales of $10.5 billion (source: Entertainment Software Association) compared with $10.65 billion in US ticket sales that year
[36] ($10.2 billion in 2011). PriceWaterhouseCooper's global estimate for the CVG market in 2009 was $52.5 billion predicted to grow to $86.8 billion in 2014. IBISWorld estimated the size of the global movie industry in 2012 at $127 billion.

[37] "Apps" refers to programmes, or applications, for mobile devices - smartphones and tablets. These are commonly a type of entertainment if not always actual games.

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Significant concentrations of games developers certainly exist in London and the South East, the North West, East Midlands and Scotland, typically based on a few well-established studios, although this conclusion predates the closure of Sony's Liverpool development studio in August 2012 with the loss of up to 100 jobs (the studio was originally founded in 1984 as Psygnosis and its best known game was Lemmings). The games industry seems to be less geographically concentrated than any other area of the media.

Regions	2010	%	2011	%	Skillset 2011
London	1,447	16.1%	1,554	18.1%	19%
South East	1,867	20.7%	1,491	18.9%	n/a
West Midlands	1,019	11.3%	1,125	13.7%	n/a
North West	1,168	13.0%	984	11.9%	30%
East of England	986	10.9%	945	11.5%	18%
Scotland	593	6.6%	668	8.1%	7%
Yorkshire & Humberside	393	4.4%	454	5.2%	n/a
East Midlands	451	5.0%	425	5.5%	8%
North East	297	3.3%	314	3.8%	n/a
South West	177	2.0%	257	3.1%	n/a
Wales	7	0.1%	13	0.1%	n/a
Northern Ireland	21	0.2%	8	0.2%	n/a
TOTAL	*8,426*	*100%*	*8,238*	*100%*	*82%*

Table 9: *UK regional employment in games development (Sources: TIGA, 2012 & Skillset, 2011)*

On the basis of job advertisements posted on the website of the AFJV, the French Agency for Video Games[39], we can estimate the size of the workforce in the French games development industry by region. Five regions accounted for 93% of advertised positions in 2006/2007. They were Île-de-France, Rhone-Alpes, Nord-Pas de Calais, Alsace and Languedoc-Rousillon. Below them came Aquitaine and Provence-Alpes-Côte d'Azur.

The largest region in terms of employment is Île-de-France, which includes more than 50% of the games companies in France. With an annual "recruitment rate" of 825 jobs, this region accounted for more than the other six combined. The préfectures of Paris, Nanterre and Bobigny accounted for 90% of the recruitment within the region - indicating a high concentration of enterprises.

Of course, it is easy to distort figures where absolute numbers are low and the industry is in a dynamic stage of development (for example, there are only two studios in Alsace, according to the AFJV, and they were both new businesses in 2006). From the union perspective, effort spent on recruitment during a volatile stage of development may be wasted as businesses start and fail with alarming rapidity. According to Robert Picard, "the failure rates for new media firms were about the same for start-up firms in any industry. Among new firms, about two thirds die within 3 years and about three quarters within 5 years. After the bubble burst, the surviving new media companies tended to be those with better ideas, better products, better business practices, and better managers."[40]

[38] *Computer Games Labour Market Intelligence,* ***Skillset, London, 2011***
[39] *http//www.afjv.com*
[40] ***Robert G. Picard,*** *"Business Issues Facing New Media", in The European Information Society: A Reality Check, ed. Jan Servaes, Intellect Books,* ***Bristol, 2003***

However, some statistics suggest that as many as 85% of new businesses in media and technology fail in their first year, while in California - with the world's most entrepreneurial culture, where media and new technologies drive much of the economy - small business failure rates are alleged to be the highest in the world.

Failing businesses may provide fertile ground for union recruitment, but that is often counterbalanced by a tendency for workers - very few of whom are freelance - to be highly mobile and able to find work anywhere in the world. In the games industry, this phenomenon may already be embedded. According to Skillset in the UK only 4% of workers in the games industry are freelance, and around 40% of workers anticipated changing their job in the next year - three-quarters of them planning to move to another games company.[41] While larger games companies expand and create jobs, they may recruit anywhere in the world. According to TIGA, the UK games industry trade association, half of all game developers leaving British studios in 2009 went overseas, 72% of them to Canada. [42]

The French company, Ubisoft has a reputation for creating jobs. According to a European Commission report, "From 2002 to 2005, Ubisoft's workforce increased by 50%. On 31 March 2005, Ubisoft employed 2,972 people worldwide: 75% in production studios and 25% in distribution and support functions. The average employee's age was 30.4 and the average seniority was 2.92 years. The majority of Ubisoft's employees have permanent work contracts."[43] While the company employed 656 in France (and 44 in the UK), the majority of its employees were based in Canada (1,110). It also employed 329 people in China, 321 in the US and 218 in Romania.

[41] **op.cit.**
[42] *Making Games in the UK Today: A Census of the UK Developer and Digital Publishing Sector,* **TIGA (The Interactive Games Association), London, 2012**
[43] **KEA European Affairs,** *The Economy of Culture in Europe,* **European Commission Culture, Brussels, 2007**

Name	Owner	Headquarters	Operations	Titles/franchises	Employs	Revenue
Ubisoft	Independent	Rennes	France (Paris, Montpellier), Bulgaria, Canada, Ukraine, Sweden, Japan, US, UK (Newcastle), Romania, Brazil, China, Italy, Spain, Morocco, Germany, India	Assassin's Creed, Brothers in Arms, Tom Clancy, Rayman	6,700+	$972m, 2010
Activision-Blizzard	Vivendi	Santa Monica	US, Canada, UK (Liverpool, Leamington Spa), France, Germany, Ireland, Italy, Sweden, Spain, the Netherlands, Australia, South Korea, China	Call of Duty, James Bond, Tony Hawk, Guitar Hero, World of Warcraft	3,400+	$1bn, 2007
Atari *	Atari SA	Los Angeles	US, France (Paris, Lyon), UK (London)	MX Rider, Splashdown, Dungeons and Dragons, Asteroids, Star Trek Online	n/a	43m, 2010
Rockstar Games *	Take Two Interactive	New York	US, UK (Edinburgh, Leeds, London, Lincoln), Canada, China, Czech Republic, Australia	Grand Theft Auto, Max Payne, Red Dead Redemption, LA Noire	2,118	$1.14bn, 2011
Eidos *	Square Enix	London	Japan, US, UK (London),	Lara Croft, Deus Ex, Batman, Kane & Lynch	3,338	$1.63bn, 2011

Table 10: *French & UK games companies*
(Source: The Economy of Culture in Europe, European Commission Culture, Brussels, 2007 & company reports)
** figures relate to owner.*

The French CVG industry is, according to most industry statistics, smaller than the UK industry (the UK is fourth in the world in terms of employment, behind the US, Japan and Canada), but punches above its weight, due largely to its claim to two and a half giants of the industry: Ubisoft, Activision-Blizzard and Atari (see Table 10). An estimated 3,000 people are employed in games development in France[44], which compares to between 7,000 and 8,000 in the UK. These figures represent a tiny fraction of total employment in the media (around 0.7% and 1%, respectively) and are comparable to the headcount for a single transnational games company.

Meanwhile, jobs move about the world to wherever the circumstances are more favourable and the production process itself is attenuated thanks to the ready availability of electronic communications and sophisticated software tools. In the UK, the CVG industry's campaigning has been rewarded with tax breaks (announced by the UK Finance Minister, George Osborne, in March 2012 following an EC decision to extend a period of allowable exemption beyond 2012) which may help to stem the flow of jobs to other countries, but a bigger influence than tax breaks on the shape of the industry is undoubtedly increasing consolidation.

Probably the two biggest UK games labels, Rockstar Games and Eidos, are now owned by global conglomerates - the New York-based Take Two Interactive and the Tokyo-based Square Enix Holdings, respectively. Rockstar and Eidos both started as small, local operations staffed by enthusiasts and grew simply by riding a global wave. Although they still own studios and employ people in the UK, these companies' development and ancillary operations may well be distributed across the world (see Table 10).

The CVG industry is truly the face of future media. It combines giant transnationals, with global sales and marketing expertise, and micro-businesses, with creative imagination.[45] It feeds off other media and, in turns, feeds back into them - turning best selling books and hit movies into games, and games into best selling books and hit movies. Its workers are highly mobile, in permanent empoyment, typically young, male and unattached. But it is caught in the midst of a technological earthquake.

[44] http://france.fr

*[45] According to Skillset, **op.cit.**, a quarter of businesses in the UK games industry employ five or fewer people, and another quarter employ more than 50.*

ANALYSIS OF RESULTS

Age and Gender Profile

In order to estimate the accuracy of our survey, it is important to check our results against certain key demographic factors.

We asked about age range (see Question 4), and the median was 40-55 in both countries with a slightly higher proportion of 25-40s in the French sample. In Fig.5, the age breakdown of our respondents is shown in percentage terms, with British and French reference figures on the right (the source for these reference figures is the US Government's Census Bureau, which maintains demographic statistics for most countries and regions of the world[46]). The reference figures show that our sample in both countries was skewed. However, the median ages for the UK and France as a whole are 40.5 and 39.7 respectively, which suggests that our sample was not wildly inaccurate.[47] In the UK, the sample under-represents 16-25s and over 55s, while over-representing 40-55s. In France, the sample under-represents 16-25s and over 55s. Both 25-40s and 40-55s are over-represented, but their relative sizes are accurate for the population as a whole. The sample populations undoubtedly overestimate earnings because they over-represent the age-groups characterised in both the UK and France by the highest earning age group of 25-55. The samples only include around 25% of the number of 16-25s one finds in both UK and French populations as a whole, which may suggest that this group is largely absent from employment in journalism and the media. This view is supported by the survey's finding that journalism and media workers tend to be highly educated and therefore may remain in education until well into their twenties.

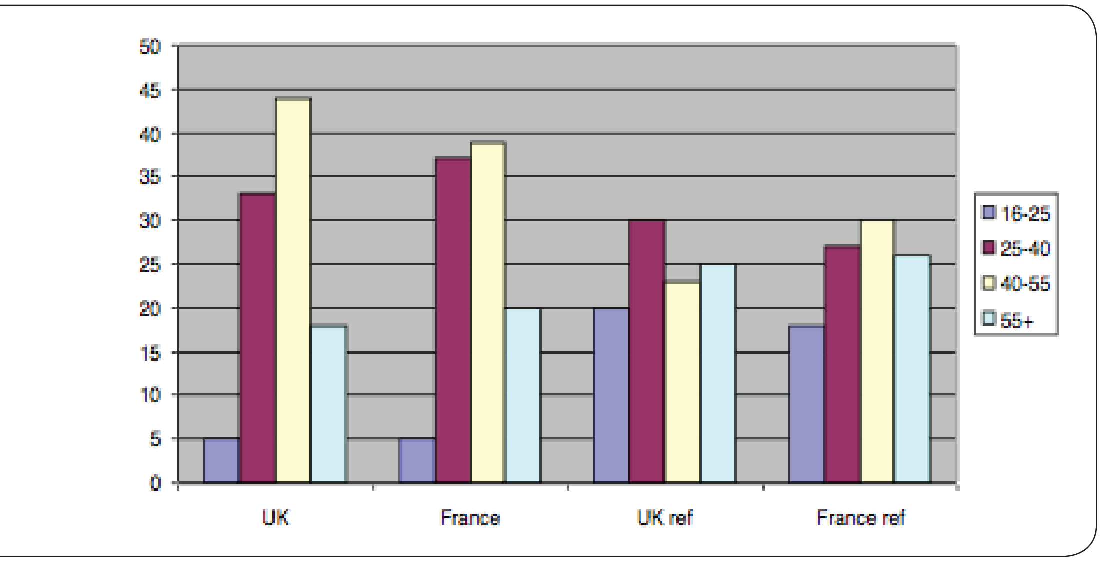


Fig.5 - The age breakdown of respondents, with reference for whole populations (%). (Sources: survey and US Government Census Bureau)

[46] http://www.census.gov/population/international/data/idb/informationGateway.php
[47] The World Factbook, Central Intelligence Agency, 2009.

The French sample was predominantly female, but only just; the UK sample was predominantly male (see Fig.6) (see Question 5). The general population in the UK and France is more-or-less evenly divided. There is anecdotal evidence that women are well-represented in the media workforce, particularly in the magazine business, but recent research by the International Women's Media Foundation (IWMF) suggests that this may only be true, if at all, at lower levels of employment:

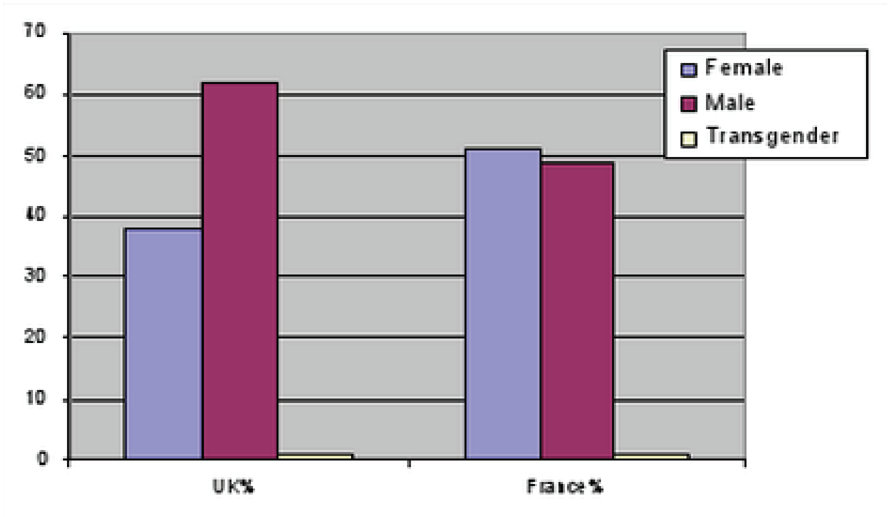


Fig.6 - Gender breakdown of respondents (%). (Source: survey)

"A geographic 'hierarchy' in which the Baltic states of Estonia and Lithuania were at the top, with women averaging 50% of the media workforce, was reported by Gallagher in 1995. These nations were followed by Central and Eastern Europe, where women were found to average 45%; the Nordic nations, where women averaged 41%, and Western Europe at the bottom, with women averaging only 35% of the media workforce. Similar geographic patterns in women's employment have been stable over time and also noted in recent research by the International Labor Organization (2009) and the World Economic Forum (2009)." [48]

The IWMF research looked at 7 newspaper, 7 television stations and 2 radio stations in the UK, and found that women represented nearly a half (45%) of the combined workforce for these companies, with this proportion reducing to less than a third at senior levels and little more than a tenth in technical professional occupations (13%). They did reasonably well at junior professional levels (51%) and in sales, finance and administration (60%). In France, the research looked at 5 newspapers and 3 radio stations, and found that women represented a similar percentage of employees as in the UK workforce (46%). The proportion reduced to a third at senior management levels, and only 17% at "governance" levels. Women were particularly well represented in production and design (71%) and sales, finance and administration (62%). They formed one fifth of the technical professional workforce in France.

Our sample is consistent with the IWMF research, and our population of respondents is similarly skewed towards broadcasting workers in the UK and newspaper journalists in France.

[48] ***Carolyn M. Byerly PhD**, Global Report on the Status of Women in the News Media. IWMF, **Washington DC, 2011.** See: http://iwmf.org/pioneering-change/global-research-on-women-in-the-news-media/global-report-online-version.aspx*

Geographical Distribution Of Employment

The geographical distribution of jobs in the survey (asked about in Question 16) corresponds reasonably well with the distribution derived from European Cluster Observatory figures for 2009 shown in Table 4 above. Figs.7 and 8 show the comparisons for the UK and France respectively. The errors which appear are due to a combination of our relatively small sample size, differences in the occupational groups covered and, in the UK, the regional definitions (for example, the European Cluster Observatory does not include Ireland or South Wales). Massive centralisation of media employment in France and the UK is an obvious and very significant feature of the labour market. It is worth pointing out that the French regional classification is more consistently followed in analytical applications than similar classifications of UK regions. Why this should be is an unanswered question, but it may be worth investigating. It is certainly worth a comment - and makes our task just a little harder.

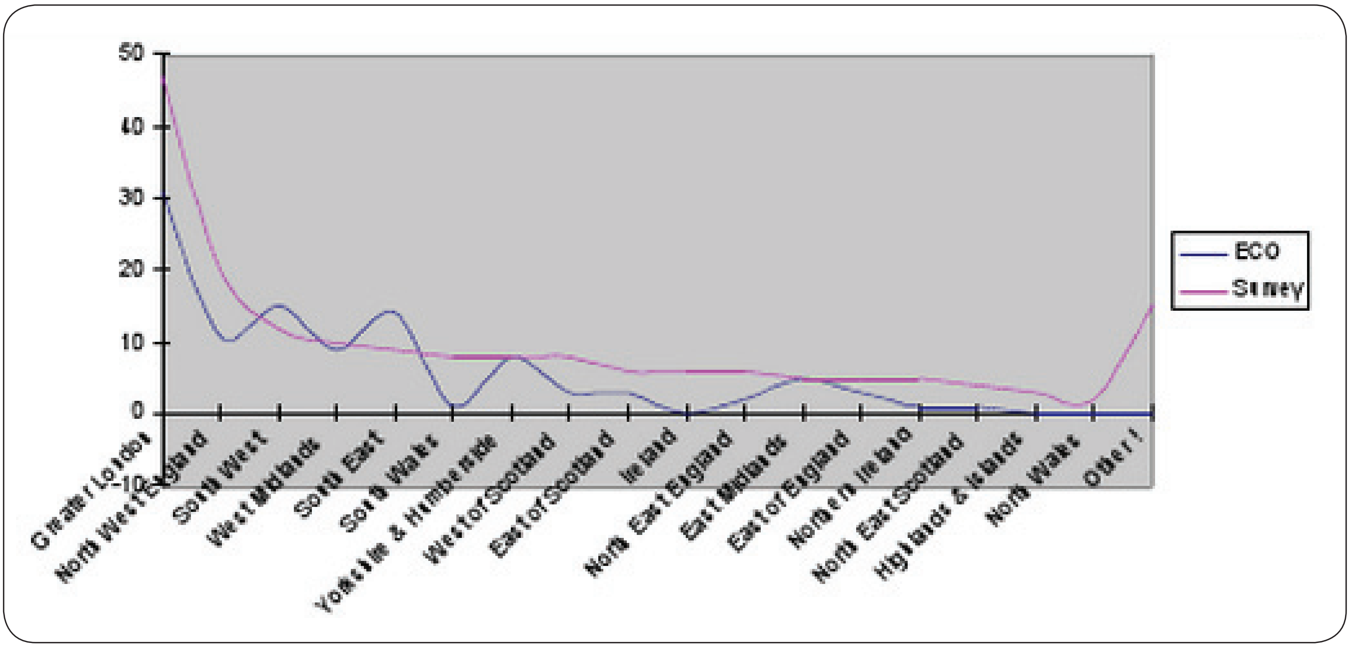


Fig.7 *- UK geographical distribution of media workers (%). Comparison between survey and European Cluster Observatory.*

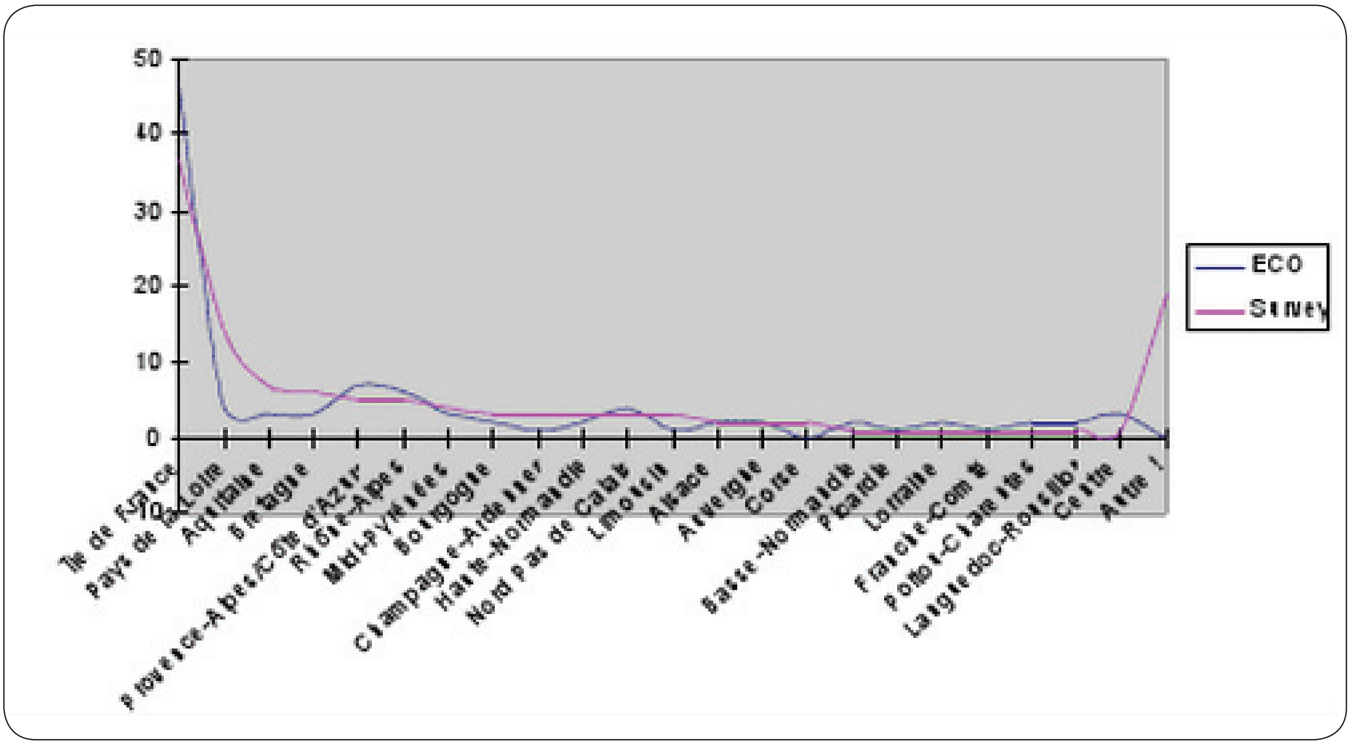


Fig.8 *- French geographical distribution of media workers (%). Comparison between survey and European Cluster Observatory.*

The Composition of the Workforce and Job Security

The survey appears to have grossly over-estimated the number of freelances (pigistes) among media employees, although official statistics often find it difficult to kow how to classify freelance workers and, consequently, under-report their number (Question 12). According to a report by the International Federation of Journalists - based on a survey of 41 IFJ affiliates representing almost 246,000 workers in a range of occupations - about a quarter of the workforce in the media consists of freelances (a further 10% ar other "atypical" workers - "those on short-term rolling contracts, sub-contractors, casual workers, temporary workers").[49] industry sectors it represents (predominantly broadcasting and the cinema) to be just over 24%, but noted that in some areas (for example, camera/photography) the proportion could be much higher - up to 73%.[50] The distortion in our survey does not appear to relate to the disparity in the number of responses between the UK and France, nor to the preponderance of BECTU members in the UK results. As Fig.9 shows, the situation appears to be similar in France and the UK. It may be that it is due to contingent phenomena (for example, the fact that freelances have more time to answer surveys), or it may be that the official statistics really do grossly underestimate the proportion of freelances in the media labour market.

It is certainly the case that UK unions believe the "casualisation" of the labour market is accelerating and that freelance membership has reached 25% to 30%. While this does not approach the figures in the survey, it indicates a penetration of freelance workers in the media that is consistent with most other survey findings. In France, the unique status of pigiste - a freelance with many of the same employment rights as a permanent employee - caused some confusion. In particular, a significant number of respondents seemed to feel that, as pigistes, they should be included in the same category as staff. Fig.9 takes into account the "Other/Autre" responses that, on investigation, we were able to allocate to specified categories within the survey. Most of these were, in fact, freelances. In the case of the French respondents, they represent about one tenth of the total.

There are very few part-timers among our respondents in either the UK or France (or among the minority of respondents from other countries - most significantly, Germany and Belgium). The majority of respondents overall are full-time staff members, but freelances form a sizeable minority (and they represent the majority in France when all respondents are taken into account).

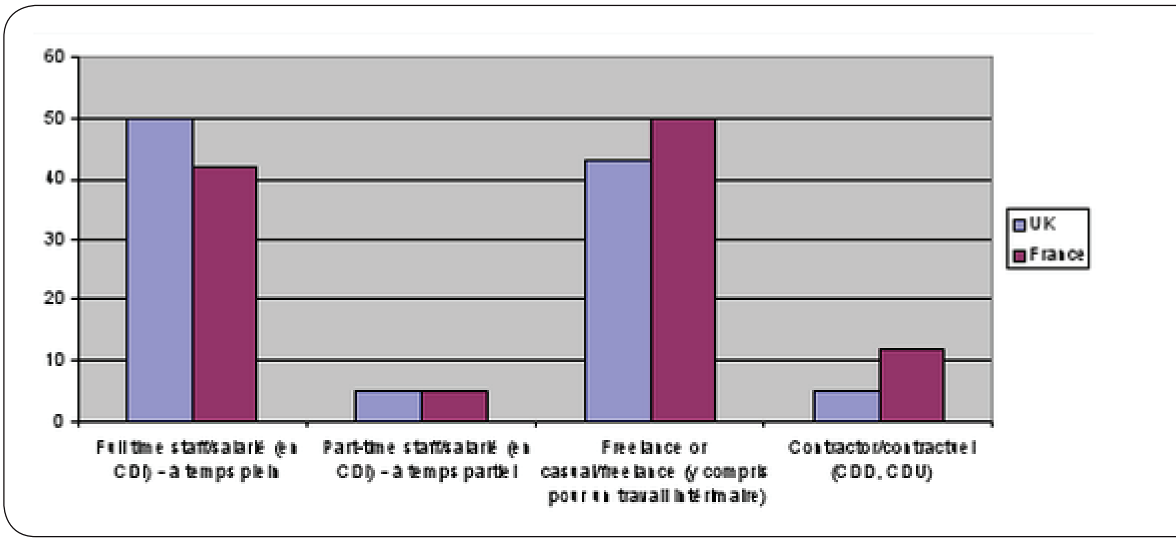


***Fig.9** - Occupational status in UK and France (%).(Source: survey)*

Perhaps most interesting is the situation shown in Fig.10. We asked respondents to identify how they had moved into journalism or the media from other areas of employment (Question 10). A total of 303 people answered this question - just over 40% of all our respondents. When we allocated the "Other/ Autre" responses, it emerged that well over 50% of the French respondents moved into the media through freelancing, while in the UK the main route was through retraining (43%, with freelancing at 33%).

[49] ***Emma Walters,*** *Christopher Warren and Mike Dobbie, The Changing Nature of Work: A global survey and case study of atypical work in the media industry, International Federation of Journalists,* ***Brussels, 2006***
[50] *Sector Skills Assessment, Skillset, London 2010*

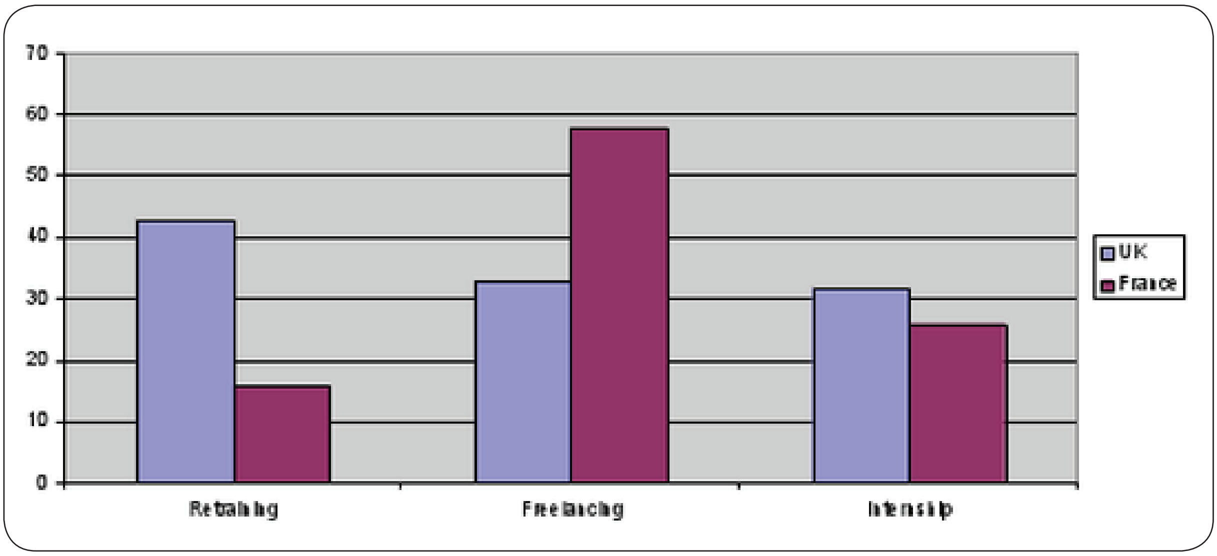


Fig.10 - Routes into media employment. (Source: survey)

In Questions 11 and 13 we asked how long people had worked in the media and how long they had worked for their current and previous employers. The results indciate that the majority of our respondents (68% in the UK and 61% in France) had been working in the media for ten or more years, while 63% of respondents in both the UK and France had worked for their current employer for five or more years. The figures reflect the greater proportion of older people in the sample (about 60% in both countries are over 40), but they also show that, notwithstanding the fears for the future expressed by many of our respondents, many of them in both the UK and France have been in stable employment for several years. This probably reflects the fact that about a half of all our respondents work for large companies in the private or public sectors (see Question 20).

Most of our freelance or casual respondents work for between two and five clients (55% in the UK and 60% in France - see Question 14), but the figures suggest that four times as many freelances in the UK than in France work for more than five clients (21% to 5%). This probably reflects the greater security of employment enjoyed by freelances in France.

We also found that contractors seem to enjoy a greater degree of job security in France than in the UK. In Question 15 we asked about the average length of contracts. In the UK 41% said 3 months or less, while in France the same proportion said more than five years. Of course, contracting is an established form of employment in France, whereas in the UK it is typically a temporary solution.

What Media do People Work in?

Fig.11 shows the survey data after allocating the "Other/ Autre" responses wherever possible. Respondents were asked to choose all media they work in - so some picked more than one - and this in itself is noteworthy. We need to go into more detail to analyse these "multi-platform" or "multi-media" responses.

We received 139 responses from the French-language survey and 490 from the English-language survey. The single most salient point is that a third of respondents to both surveys work on websites.

This is regardless of the fact that French-language responses were dominated by SNJ/SNJ-CGT members (print) and that English-language responses were dominated by BECTU members (TV/radio). A second point is that relatively few respondents chose "newer" media - and most of those were from the UK sample. This may indicate that newer media are more developed in the UK than France, as the short survey of affiliates seems to support. However, it is a conclusion that needs more evidence, although the UK figures may reflect more successful union strategies of recruitment in new media. It is noteworthy that, despite the bias in the respondents, more than a third of them in both countries (35% in the UK and 37% in France) work on web sites. More than a fifth of the responses from people who had indicated that they worked in neither the UK nor France selected "Film or digital film", which we take to indicate a substantial number of "mobile" film-makers. It is a reminder that, in many areas, employment in the media is increasingly globally, rather than nationally, organised.

We went on to distribute the responses (as far as possible) among the standard European Cluster Observatory categories - "Print & Publishing" and "TV & Radio". The results are shown in Fig.12. We took the figures from the EU's Cluster Observatory for creative industries and ignored the "Art & Literature" and "Advertising" categories (although a total of 16 respondents did identify themselves as working in PR, marketing and agency work or media management, this did not seem to be substantial enough to justify the inclusion of "Advertising").

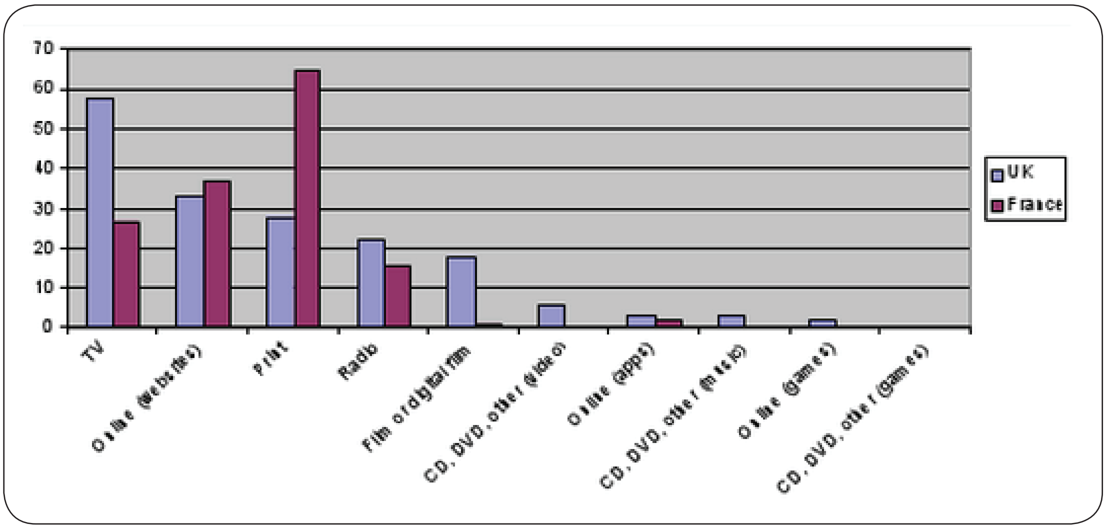


***Fig.11** - Comparison of the media that respondents work in (%). (Source: survey)*

The two columns on the right show the comparative size of the Print & Publishing and TV & Radio sectors in the UK and France according to the Cluster Observatory in 2009. This shows that the French survey results,

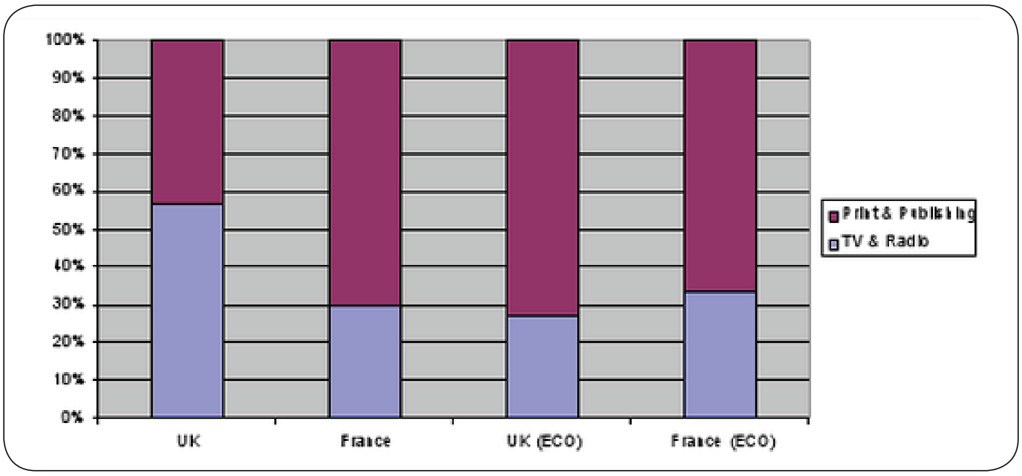


***Fig.12** - Relative sizes of the main media sectors (%). (Source:survey & European Cluster Observatory)*

despite being based on a low sample, correspond with a high degree of accuracy with the EU's figures, while the UK results are clearly skewed by the preponderance of BECTU members in the survey results.

Work Activities and Multi-Activity Working

Fig.13 shows the responses to Question 18 ("What are your main areas of work?"). We were particularly concerned to estimate the extent and nature of "multi-activity working" (which covers the more familiar terms "multi-media working" and "multi-platform working") in our industries, and asked respondents to select all the different tasks from a list they do as part of their work. The smoother line represents the UK responses in order of magnitude.

The question was designed to elicit activities of respondents not necessarily related to specific media. The answers show how journalism and media work are changing in both countries.

It is clear that the majority of respondents overall, whatever their precise job title or job description, wrote (and we included any type of writing) - 63% in France and 43% in the UK. "Producing, planning and project management" (one category) came second in the UK as an activity (about 28%), while in France "Subediting or copy editing" came second (about 52%), reflecting the greater representation of journalists. Third in the UK was "Videography, animation or video editing" (27%), reflecting the greater representation of BECTU members. These are all traditional media tasks. But close to the top of the list in both the UK and France is "Content management" - until a few years ago, an unknown area of activity. The percentages are remarkably close - 18% in the UK and 17% in France.

The "Other/Autre" category includes many jobs that should have been selected from the main options. We have adjusted the percentages to take account of these and the revised figures are shown in brackets, ( ), as usual. There is clear confusion about ancillary roles - which include highly skilled technical and engineering roles as well as make-up, research, liaison and archiving - and when it comes to writing, which is an aspect of many jobs for which it does not constitute an output. Other areas which seem to cause confusion are teaching and training and PR work. Both of these are likely to be expanding areas for union recruitment, but as with functions such as social media marketing and so-called "Search Engine Optimisation" (which is closely related to "information architecture", mentioned by one of the respondents) unions in both France and UK do not always expressly address people working in these areas, or - if they do - are not perhaps clear enough about their offering. We included teaching within the category of "Performance and presentation'".

The French figures tail off rapidly, apparently indicating a lower level or diversity of multi-activity work. Few French respondents were involved in commissioning or editing, social media marketing, search engine optimisa tion, design, ancilliary services, work as an assistant or deputy, performance or musical work. Interestingly, the social media and SEO marketing roles were significantly better represented within the UK, with 15% of UK respondents and 8% of French respondents selecting the first, and 7% and 3% selecting the second, but very few respondents in either country had anything to do with coding or web development and database journalism or infographics - current "hot" areas for recruitment (6% in France and 5% in the UK for coding; 5% in France and 3% in the UK for database journalism). The lesson seems to be that traditional skills still dominate, although the newer ones are beginning to show.

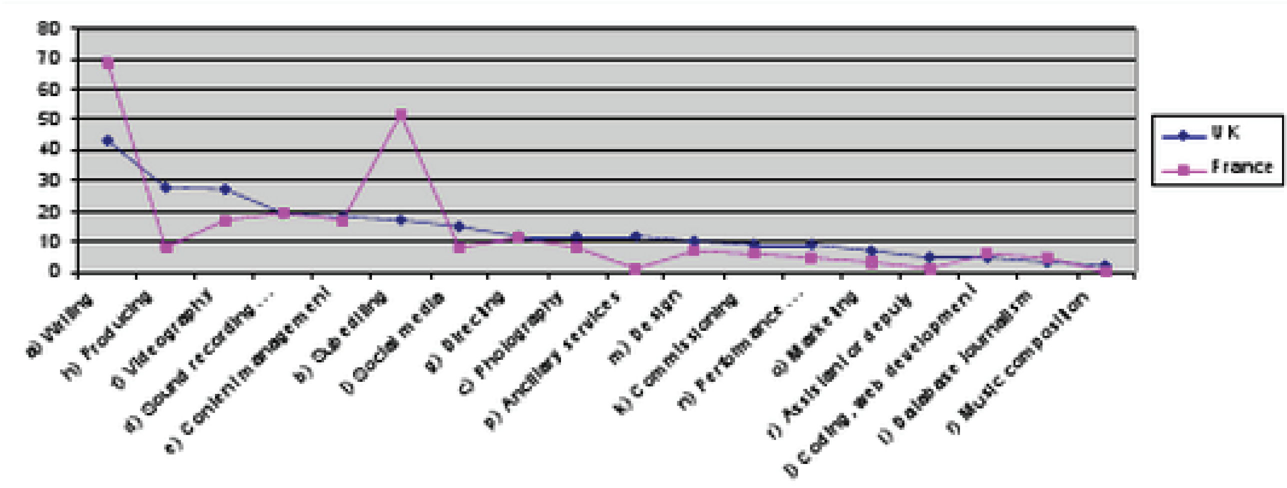


***Fig.13** - Comparison of main work activities among respondents (%). (Source: survey)*

Finally, and unexpectedly, we calculated the average (mean) number of activities per respondent in both the UK and French samples. It came to 2.6 in France and 2.56 in the UK; virtually identical. This seems to answer the implicit question above: in France, there is as much "multi-activity working" as in the UK, but it is less diverse. The subject has been raised in a large number of the comments reported in answers to Question 35 ("Please comment briefly on the major changes you have experienced in your working life") and was extensively aired at the project's Brussels workshop on 10-11 May, 2012. It will increasingly become an issue for unions in the media, and may well become an important theme for recruitment strategies.

Union Membership

About 10% of the respondents to the UK survey - 47 people - were not members of a union. Almost twice as many respondents to the French survey - 86 people or 62% of the total - were not members of a union (see Table 2). This reflects tobsome extent the situation in each country with respect to union membership. According to the OECD, union membership in France is about 9% of the workforce, while it is 29% of the workforce in the UK (See Table 5). In informal discussions, no-one expressed surprise at either the comparatively low response rate or the comparatively high proportion of non-members in the French language results. Nevertheless, the small number of non-members may provide useful insights into the requirements of a successful recruitment strategy.

Of the respondents who said they were union members, 30% belonged to EFJ affiliates and 64% belonged to EURO-MEI affiliates (see Table 11). The disparity reflects the relatively good response we received from BECTU membership. We understand that this is largely due to "cultural factors" - BECTU members have an established practice of responding to surveys within the union. The remaining 6% of respondents who said they belonged to unions (33 individuals) often belonged to organisations which were not in fact unions, were outside our geographical area of concern or were otherwise unclassifiable. Ten belonged to the German union Ver.di/DJU and 5 to the Spanish CC.OO.

BECTU	300
NONE	133
NUJ	109
SNJ	20
SNJ-CGT	17
VER.DI/DJU	10
SNRT-CGT	8
CC.OO	5
UCU	2
USJ-CFDT	1
CGT TDF	1
AFD	1
SNJT	1
AJP	1
FNSI	1
UGT	1
ESIEA	1
FAPE	1
TUCJ	1
AGJPB	1
Unite	1
FPA	1
ESIEMTH	1
GMB	1

TABLE 11: *Membership figures (Source: survey)*

In the UK, 65% belonged to BECTU, 23% were NUJ members and one person belonged to the USF-CFDT. Twelve respondents answered "Other" to the question of which union they belonged to. These included one joint member of the NUJ and UCU, one NUJ member who seemed to think that the union "cannot represent me as I am a freelance" (a belief expressed elsewhere in the survey by a handful of respondents), one joint member of the GMB and NUJ, one member of the UCU, one member of the Union of Journalists of Daily Newspapers Macedonia (Thrace), one member of the Foreign Press Association in London, one person who wrote "None for negotiating purposes, BECTU for old time's sake", one member of Unite, one member of the Association Générale des Journalistes professionnels de Belgique, one member of the French Convention of Journalists, one member of the Trade Union of Croatian Journalists and one member of Federación de Asociaciones de Periodistas de España.

Of the respondents to the French-language survey who claimed union membership, 13% belonged to the SNJ, 12% were SNJ-CGT members, 7% belonged to the SNRT-CGT and one person was a member of the USJ-CFDT. Seven people answered "Other". They included one NUJ member, one member of CGT-TDF (the union for employees of the French broadcast and communication infrastructure provider, TDF), one "member" of the French Development Agency, AFD, one member of the Tunisien SNJ, one member of the AJP (the Association des Journalistes du Patrimoine), one member of the Italian journalists' union, FNSI, and one person who said they were not in a union.

In most cases, the organisations mentioned in the "Other/Autre" list - not all of which are unions representing journalists or media workers - were entered on the survey forms by respondents living and working outside the UK or France. The members of unions listed in Question 23 in the questionnaire have been added to the figures in the survey responses. The other memberships are statistically insignificant.

The fact that a substantial majority of UK respondents were BECTU members does not reflect the balance of BECTU and NUJ members nor the penetration of union members in their respective industries. The majority of French respondents were not union members at all. The majority of respondents who were union members were from journalism unions - the SNJ, SNJ-CGT and USJ-CFDT. The relatively low percentages for other media unions who were canvassed for the survey does not reflect the penetration of union members in their industries nor their relative strengths.

In Question 24, we asked how long respondents who identified as union members had been in membership. Most respondents (72% in the UK and 75% in France) had been members of their unions for over three years - which might be expected from a group who are relatively old when compared to the population at large. But the more interesting figures are the sizeable numbers - 12% in the UK and 14% in France - who had joined their unions in the past year. The French figures correspond well to the percentage of respondents in the 16-25 age group, but the UK figures are almost twice what one would expect if the new members were all in the 16-25 age group.

Union Members and Non-Members Compared

Taken as a whole, non-members were slightly younger than the average in both France and the UK (based on a cross tabulation of age group with union membership status). In the UK, they were more likely to have a post-graduate degree (28% as opposed to 17% of BECTU members and 18% of NUJ members) but were less likely in France to have a Licence Universitaire (25% as opposed to around 50% for the SNJ and SNJ-CGT). They strongly believed their qualifications were relevant to their main area of work (an overwhelming 85% in the UK as against 60% and 63% BECTU and NUJ members, and 78% in France, which is about equal with the SNJ and SNJ-CGT). In the UK, they were slightly less likely to have worked in another area before moving into journalism, while in France they were more likely to have done so compared with the SNJ and SNJ-CGT but less likely than the SNRT-CGT (who seem, from our results, to graduate to the media from industry). Non-members are considerably more likely to be relative newcomers in both the UK and France (in the UK, 18% have worked in the media for less than a year, as against 1.4% and 4% for BECTU and NUJ members, while among our French respondents they are the only group not to have been working in the media for ten years or more).

The majority of non-members are full-time employees in the UK, and freelances or pigistes in France, which accords with the figures for the sample as a whole. The majority of the non-member respondents in the UK work overseas or in Greater London (about 30% for each) while the corresponding figures for French non-members are 15% overseas and 43% in the Île de France. A significant number of non-members in France (21%) work in the Pays de la Loire region whose main cities are Nantes, Angers and Le Mans. According to the European Cluster Observatory, Pays de la Loire scores better than average for employment in the “Art & Literature” and “Print & Publishing” categories (25% better than average for all media employment in the region), which accords well with the fact that non-members tend to work in print (60% in the UK, 75% in France) or on websites (55% in the UK and 35% in France). There are no relevant pôles de compétitivité in the region. While the majority of non-union members are writers (80% in the UK, 76% in France), a significant proportion in the UK (40%) work in social media marketing, social media management or community management, while 60% in France are sub-editors or copy editors.

The social media figure compares with 25% of NUJ members who work in this area, and 8% of BECTU members; the sub-editor figure compares with an aggregate of about 35% in SNJ or SNJ-CGT.

The employer lists for non-members and members are similar once you account for the preponderance of the BBC in the BECTU members' list and France Télévisions in the SNJ-CGT list. The lists, generated from answers to Question 19 - (“Who is your main current employer? (Freelances should list up to three clients)”) - may provide useful information for recruitment in the UK and France and are shown in summary form in Table 12. By far the largest number of respondents, 161 (27%), were employed by the BBC with ITV accounting for 15 (3%) respondents and BSkyB/Sky and RedBee Media both accounting for 9 (2%). A number of other broadcasters and production companies were represented, and television was the single most significant sector among the respondents. National newspapers and agencies accounted for 10 respondents (2%) and local and regional newspapers for 18 respondents (3%). Other areas with significant representation included academia, magazine publishing and trade unions. In general, the diversity of employers, from small websites to Rolls Royce and the Council of Europe, is worth noting. Substantial numbers of respondents did not wish to identify employers or clients or noted that they worked for “various” clients.

The French respondents mentioned France Télévisions (16 - 9%), Radio France (10 - 5%), Wolters Kluwer (4 - 2%), RTL (3 - 2%), France 24 (3 - 2%) and a number of local and regional newspaper titles and magazines - (17 each - 9%). National newspapers and agencies account for 10 respondents (5%) and local and regional newspapers for 17 respondents (9%) - including 3 from Ouest-France. Other areas with significant numbers of respondents include the public sector and public sector related magazines or web sites.

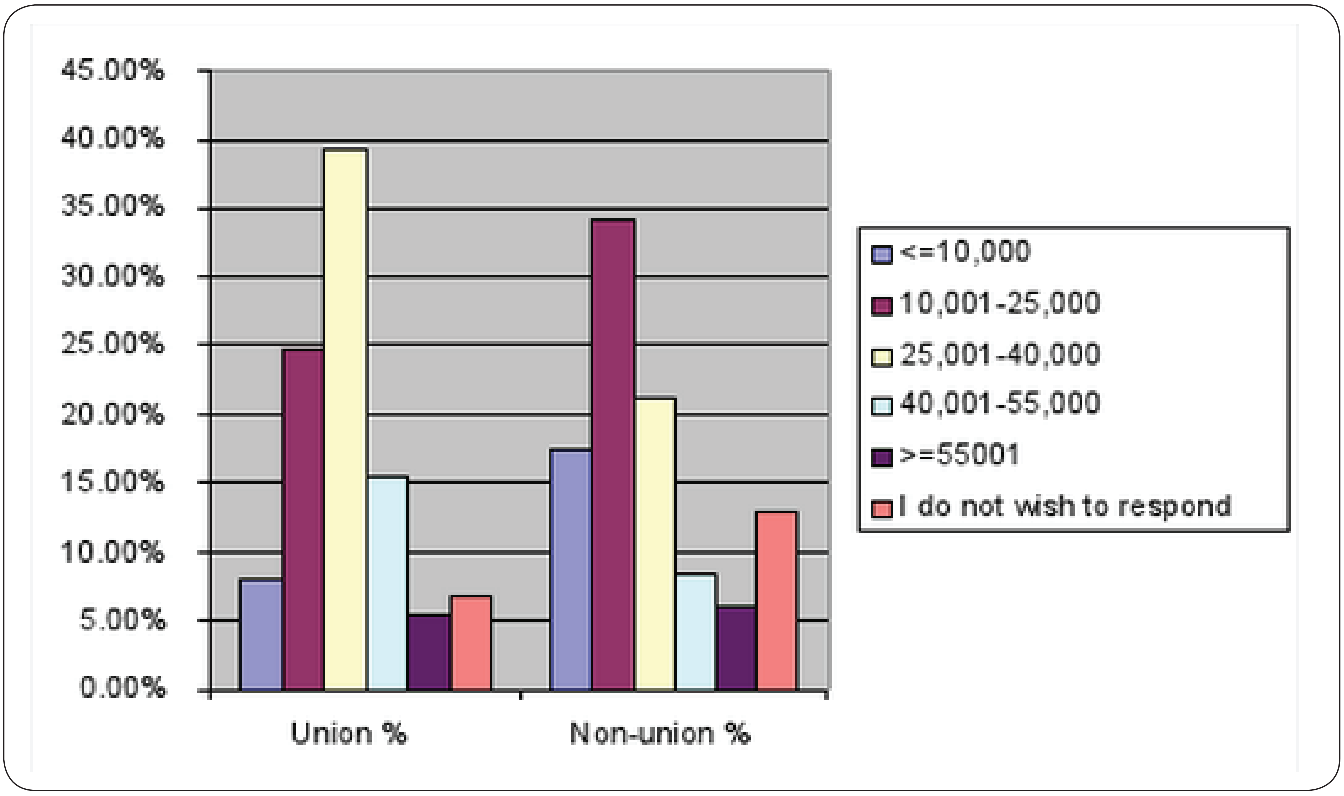
Employer	UK
BBC	116
Local & regional press	18
ITV	15
National press	10
BSkyB	9
Red Bee Media	9

Employer	France
Local & regional press	17
France Télévisions	16
Radio France	10
National press	10
Wolters Kluwer	4
RTL	3
France 24	3

Table 12. *Main employers/clients. (Source: survey)*

The UK results show a greater degree of concentration of employment (about 1.6 respondents per enterprise compared to 1.3 respondents per enterprise in France) with substantially more respondents in a single organisation (the BBC). Newspapers and radio account for a significantly greater proportion of respondents in France than the UK. Unions and independent production companies are better represented among the UK respondents than the French.

Fig.14 - The pay levels of union and non-union respondents compared (%). Pay bands were listed in the local currency (%).(Source: survey)



There is a tendency for non-members in both the UK and France to work for smaller businesses in the private sector, and in both countries comparatively few non-members work for large public sector organisations when compared with union members (see the section above on Changes in the Media Industry (1970-2012)). This is certainly less to do with the nature of the work or the individuals concerned than it is to do with the history of public sector organisations in Europe. State funded or state controlled organisations like the BBC and France Télévisions are likely to have strong and influential unions.

The evidence of the survey supports the contention that non-members of unions are generally lower paid than members - particularly at the lowest end of the pay-scale (up to 10,000 € or £10,000) (see Fig.14). Non-members were also the least likely to answer the question about their pay (see Question 22 - "Please indicate your average annual earnings"). The numbers are small, and we have not taken the relative weight of the pound to the euro into account, but according to our figures, the median salary band for unionised workers is £/€ 25,001-40,000; for non-unionised workers it is £/€10,001-25,000. The age profile of non-unionised respondents is lower than the age profile of their unionised colleagues - the median age group in each case being 25-40 and 41-55, respectively. It's not clear what precise effect this has on pay levels. Among respondents in the 25-40 age group, 16% of non-union respondents were in the £/€ 10,001-25,000 salary band and 14% of union respondents were in the £/€ 25,001-40,000 band (see Fig.15). In the 41-55 age group, 5% of the non-union respondents were in the £/€ 10,001-25,000 band and 5% in the £/€ 25,001-40,000 band, while 16% of the union respondents were in the £/€ 25,001-40,000 band band (see Fig.16). This certainly suggests that age plays a role in determining salary, but it also indicates that non-unionised respondents were earning less than unionised respondents even in the two age groups in which pay would peak. This effect is confirmed anecdotally by the fact that in the 55+ age group one unionised respondent and seven non-unionised respondents were in the lowest salary band.

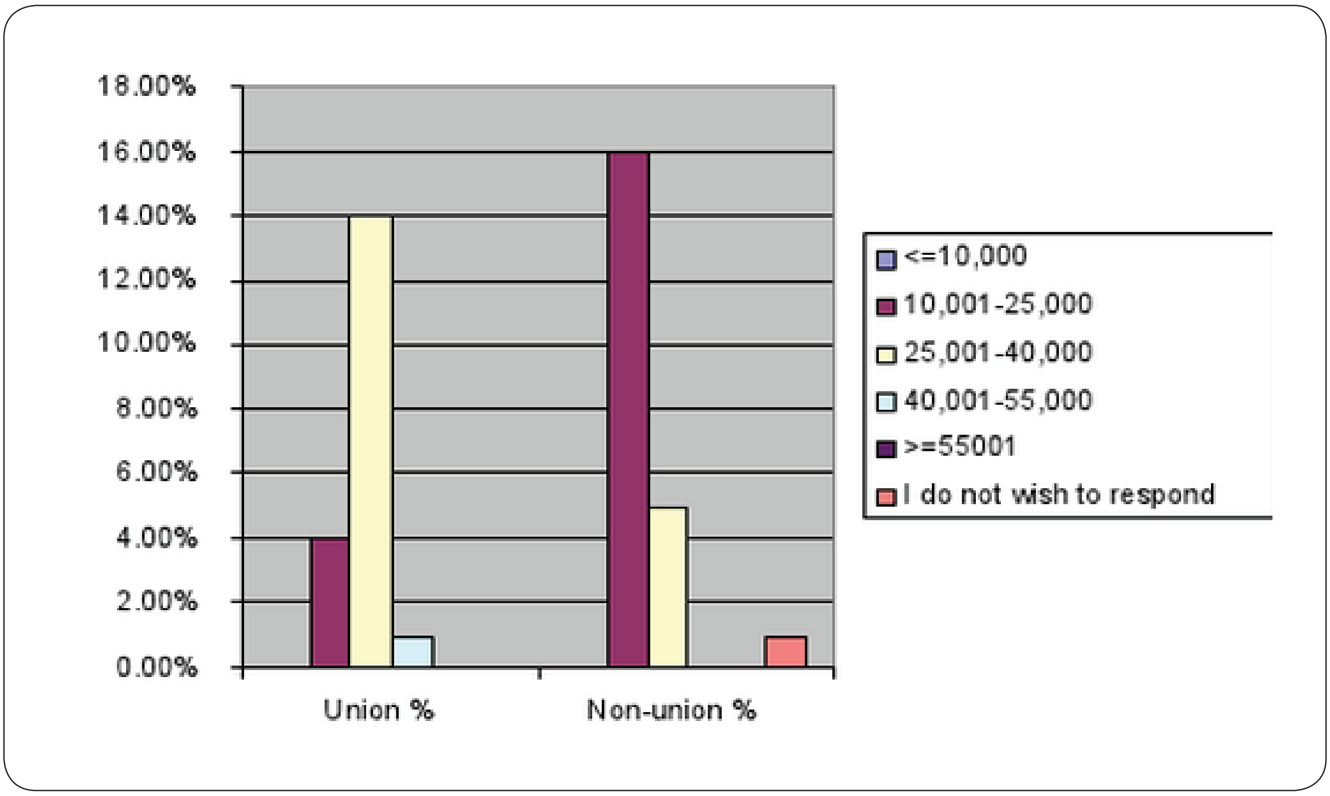


Fig.15 *- Salary levels in union and non-union respondents in the 25-40 age group (%).(Source: survey)*

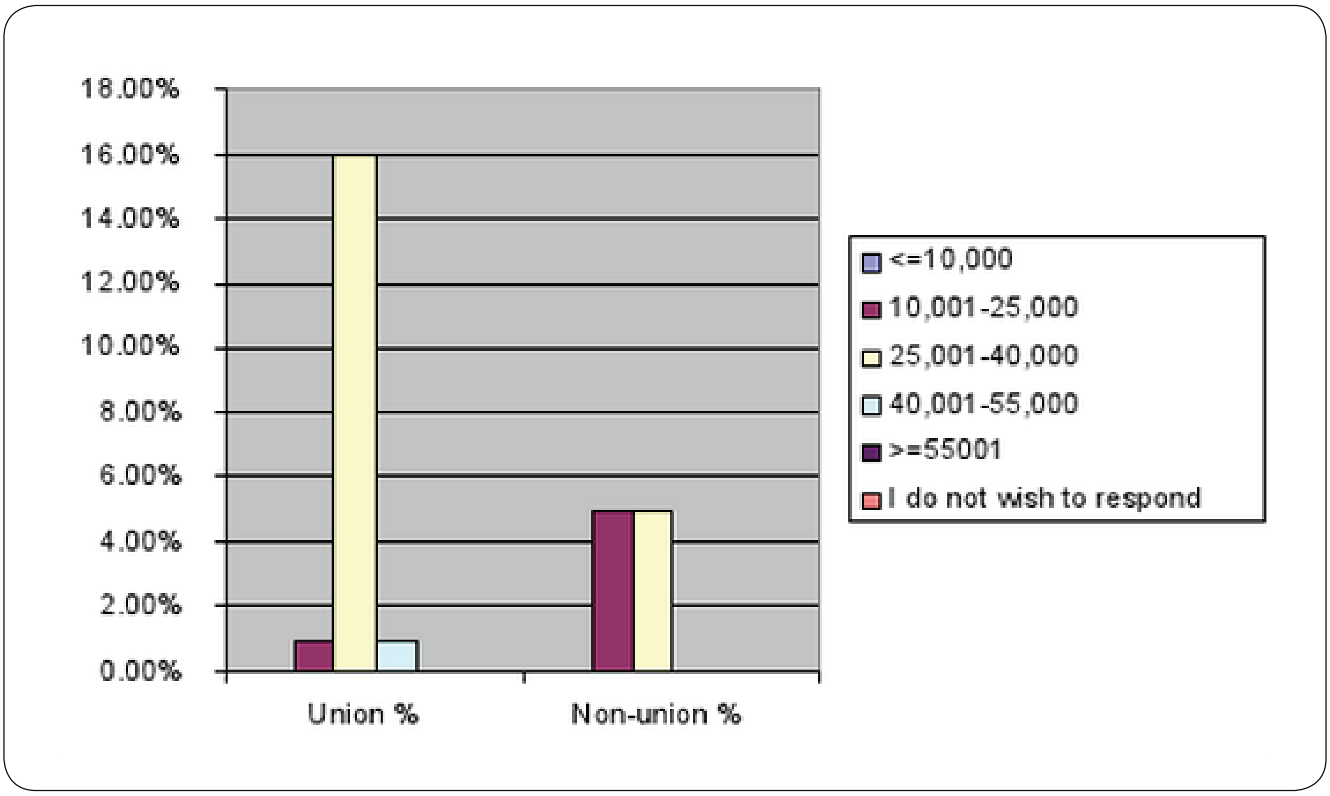


Fig.16 - Salary levels in union and non-union respondents in the 40-55 age group (%).(Source: survey)

Reasons for Joining or not Joining a Union

We separated the respondents for some questions in those who had identified themselves as union members and those who had identified themselves as not belonging to a union. We wanted to ask about their reasons for joining or not joining a union in the belief that this might help to inform strategies for recruitment and retention.

As can be seen in Fig.17, the commonest reason by far for joining a union among both French and UK workers is belief in the aims of trade unions - 71% in the UK and 85% in France cited this reason (see Question 25 - Why did you join your union?). Second and third were improvement of wages or working conditions (37% UK, 23% France) and 'to defend my job' in the UK (30%) and 'to help me network' in France (19%). The figures take into account the “Other/Autre” answers which we were able to allocate to existing options. Among UK respondents, most of these listed perceived “practical benefits” of union membership such as insurance, access to a press card and training. French respondents, by contrast, mentioned employment law and the “Plan Sauvegarde de l’Emploi”, “defending the profession” and the fact that it would be stupid not to join a union, given the behaviour of employers.

It may be that belief in the aims of trade unions is the lazy answer to this question, but it may also be worth pointing out how little persuasion, networking opportunities, or representation and legal advice seem to matter by comparison. The last two are often given as persuasive reasons for joining a union - particularly in the media world, where individualism is often believed to hold sway. Perhaps it is time to reconsider our core values of solidarity, support and collective strength. The fact that such a substantial majority of respondents in both the UK and France selected belief in the aims of trade unions as their reason for joining suggests, on the one hand, that the most powerful motive for joining a union may indeed be ideological. On the other hand, in the UK a significant minority of respondents identified particular benefits (particularly insurance) rather than abstract principle, and we should perhaps consider the possibility that the very vagueness of the idea of “the aims of trade unions” is part of its attraction.

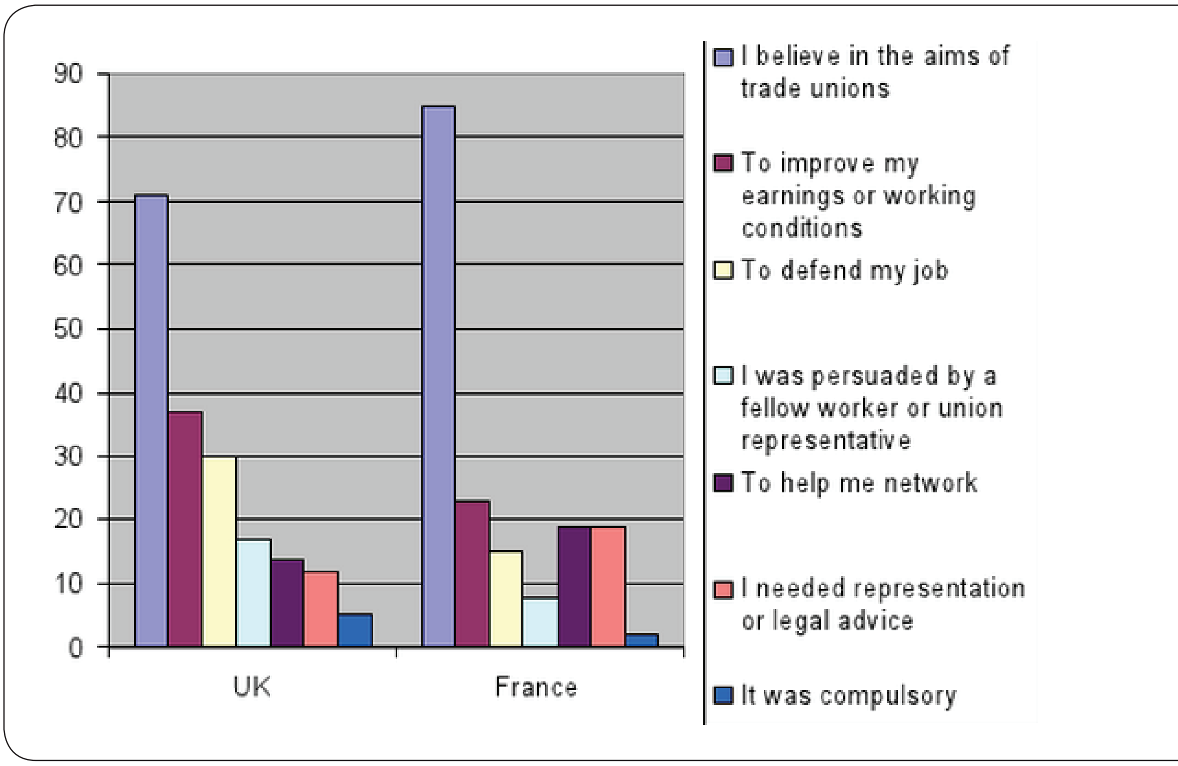


Fig.17 - Reasons for joining a union.

In answer to the question “Would you be prepared to join a union?” (Question 29), only 18% of the UK non-members said they would not, while 39% said they would and the majority (44%) said they were unsure. In France, the figures are similar - 23% would not join, 40% would and 38% were unsure. Overall, the majority feeling about joining a union seems uncertainty, and only one fifth of all respondents were actively hostile. Interestingly, there are no significant differences between the responses for the UK and France, despite the very different samples in our survey, and cultures and current levels of union membership in the two nations. The figures have been adjusted to take “Other/Autre” responses into account.

The responses to Question 30 (“Why are you not in a union?”) suggest that there are important differences between the English-language and French- language respondents (see Fig.18). In both the UK and France the lack of active recruitment and a feeling of not needing help are clearly significant problems. In France, employer hostility seems to be a more significant barrier to recruitment than it is in the UK, while UK respondents singled out a perceived irrelevance of unions to freelances and a small number expressed concern about cost. The most interesting answers came in the “Other/Autre” section, where it became clear that misunderstanding or lack of information about eligibility or the relevance of unions to particular jobs was worryingly high in both countries. This can only be expected to increase with the changing patterns of media employment. The fact that 12 UK respondents saw insurance as a reason for joining a union is instructive. Only six respondents seemed to understand that being in a union is itself a form of insurance. Among other reasons, not on the list of options, a number of respondents seemed to make excuses rather than express reasons - not enough time, too neglectful, too many undeserving members. Recruiters are unlikely to win over

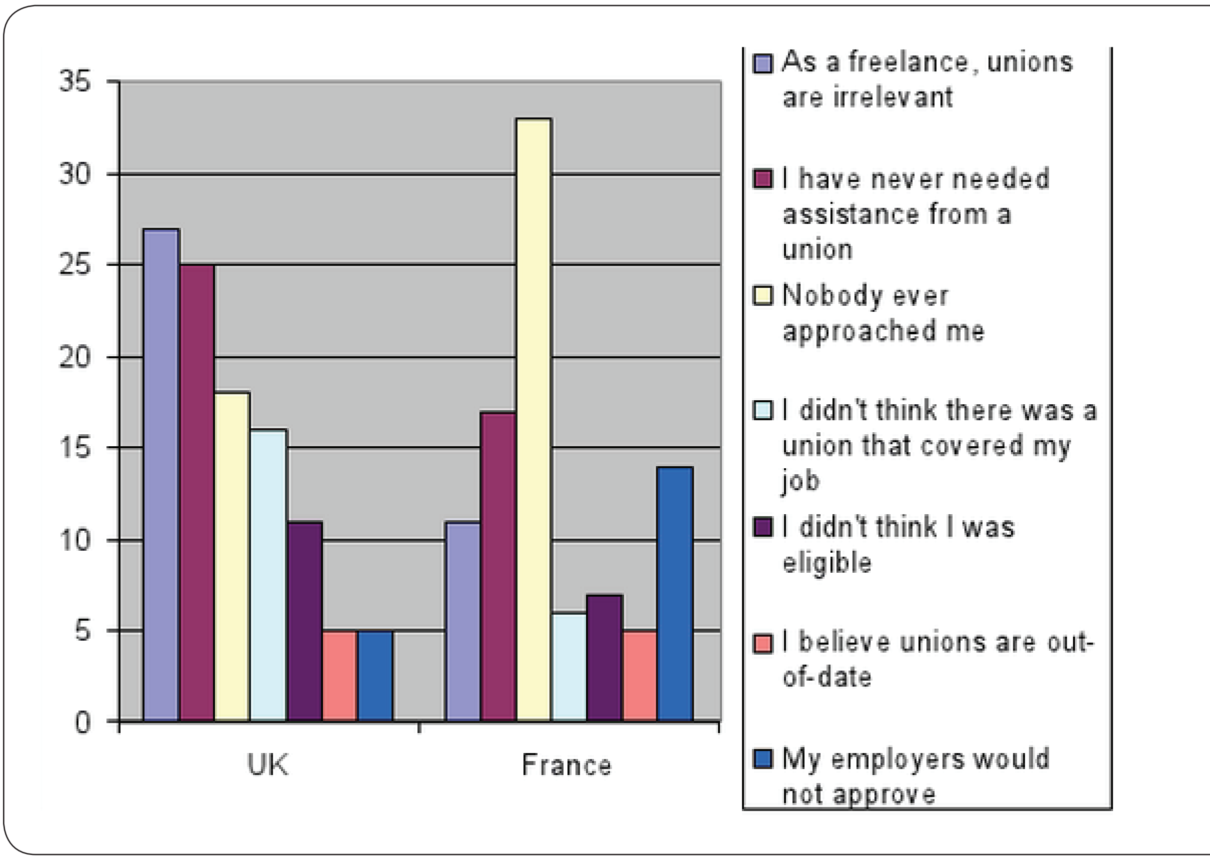


***Fig.18** - Reasons for not joining a union (%).(Source: survey)*

people who make such excuses, but more and better information - even at a most basic level - may help. It is clear from the numbers of people who answered Question 35 (“Please comment briefly on the major changes you have experienced in your working life”) that there are many people in the media who are concerned by the erosion of professional standards and ethical values. Recruitment strategies that emphasise the role of unions as the defenders of standards and values and focus on the question “Why haven’t you joined a union yet?” may have good results.

Training

The vast majority of our respondents in both the UK and France, whether in or out of a union, said they had received work-related training within the last five years. The proportion is just over 72%. There are differences between countries and related to union membership. Fig.19 shows the ratio of union members to non-members who have or have not received training in the last five years. The 100% point marks equality - where there is no difference between belonging to a union and not belonging to a union. In France, there is proportionately more training than in the UK and more union members than non-members in France received training. In the UK, things are the other way round (see Questions 27 and 32). Fig.20 shows who provided or funded the training, and here we can see a good picture of how training provision works. There was some confusion in answering this, but it is clear that employers (or clients) are by far the most significant provisioners of training in all circumstances.

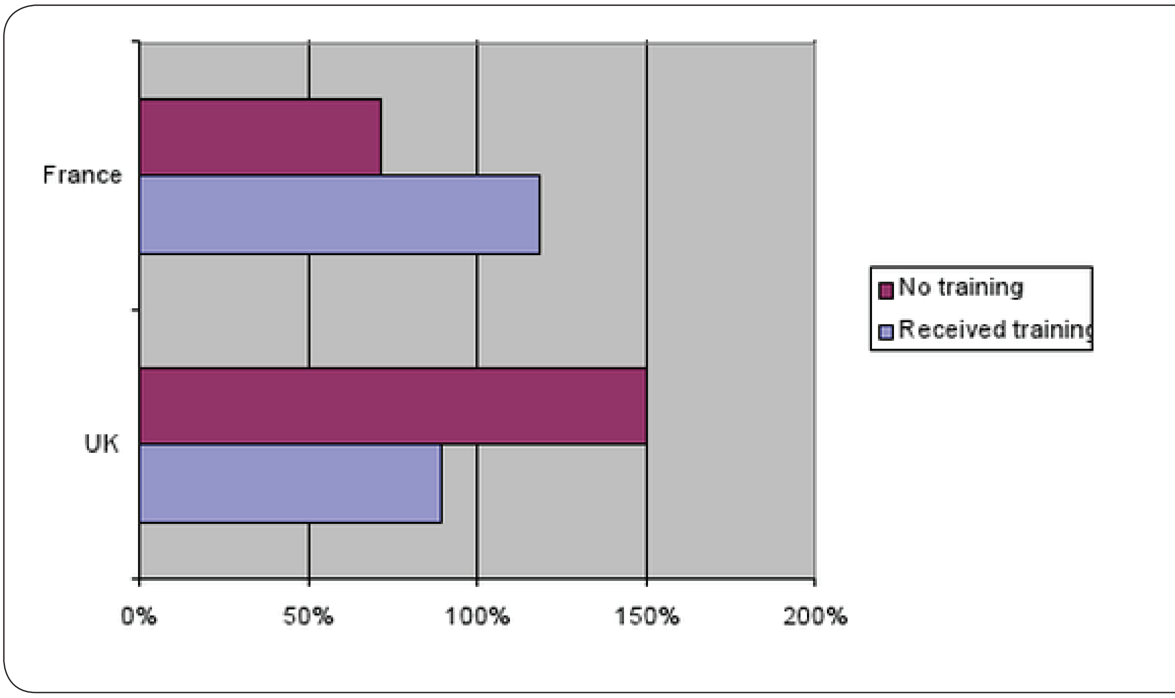


***Fig.19** - Ratio of union members to non-members who have or have not received training in the last five years(%).(Source:survey)*

Government schemes, although identified by a minority of respondents, are clearly substantially more important in France, which is almost certainly connected with the the fact that the French Government's DIF scheme (Droit individuel à la formation) provides a legal right to, and funding for, vocational training for permanent (CDI) or fixed term (CDD) contractors. In the UK, only people working in organisations with 250 or more employees have any rights with regard to vocational training - and that is only a "right to request time for study or training". Some funding for learning may be available through unions, but the survey demonstrates that this pales into insignificance when compared to the contribution of employers to learning provision. Non-union members in France were approximately 50% less likely to rely on employers or to provide their own training than union members, the slack being taken up by State funding. The differences in the UK were negligible.

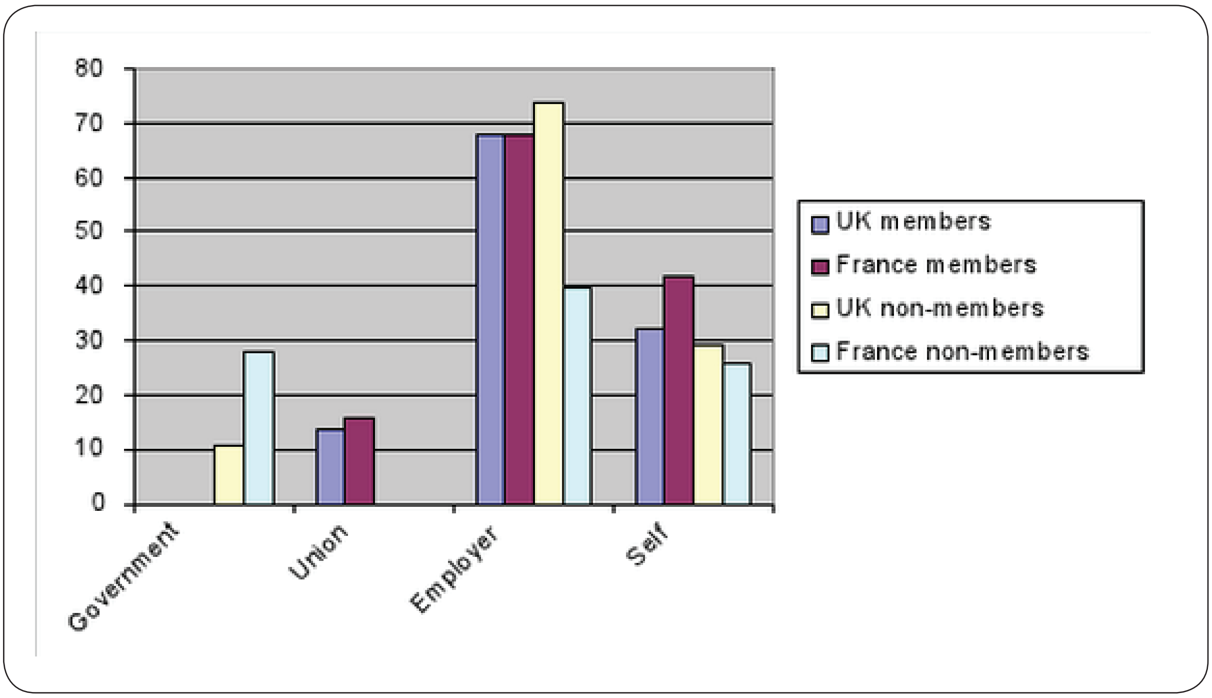


Fig.20 - Who provisions or funds) training (%)?

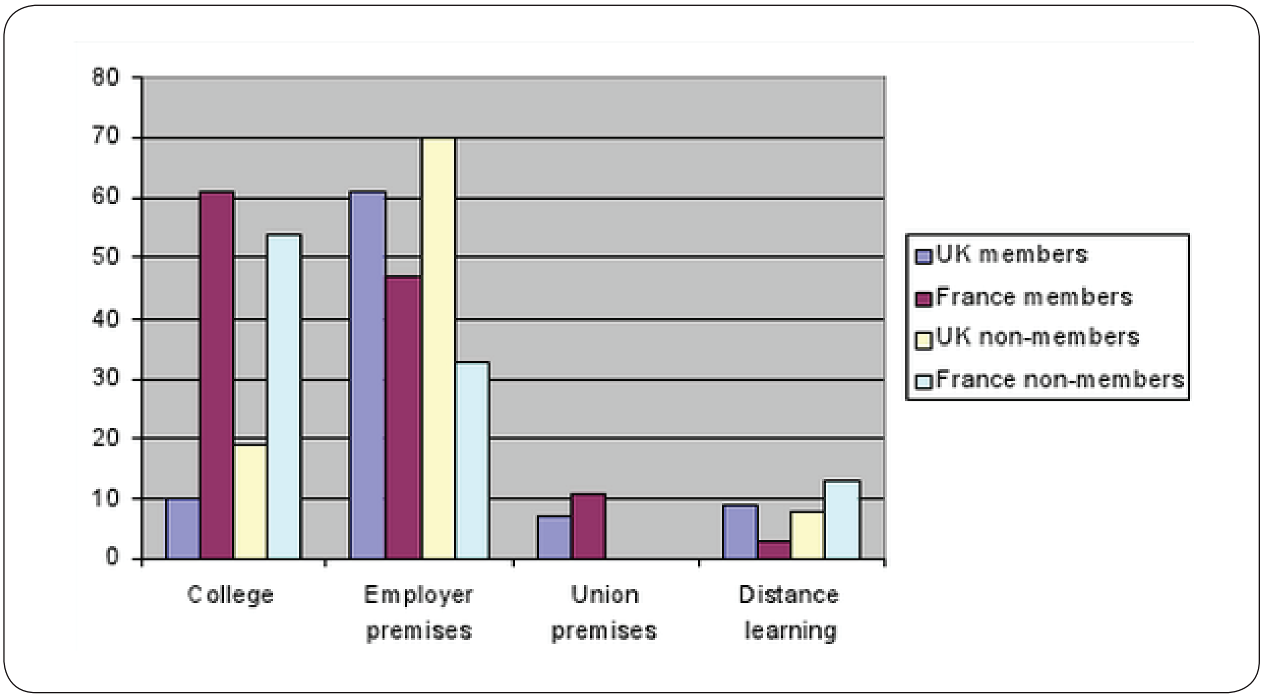


Fig.21 - Where is training delivered? (%).(Source:survey)

Fig.21 shows that employers also played the dominate role in the actual delivery of training (Questions 28 and 33 - "If you have received training, how was it delivered?"), although French-language respondents actually cited colleges and universities more often. Union premises and distance learning both hovered around the 10% level for all respondents, and colleges and universities were hardly any more significant for UK respondents.

WORKSHOP REPORT

The two-day EFJ/EURO-MEI workshop on "Mapping Change in the Media and Journalism", held in Brussels on 10 and 11 May, 2012, was the main activit of the project. It was aimed at identifying "who is doing what" in the journalism and media industries, with France and the UK as test countries. Using evidence provided by the preliminary report of our survey, the workshop sought to identify gaps in trade union representation and discuss how unions might engage with the rapidly changing media landscape. The discussions were introduced by a keynote speech from French media academic and the head of digitalization for France Télévisions, Bruno Patino.

Patino's enthusiasm for all things digital sparked much discussion during afternoon sessions on 10 May and in the morning of 11 May. These sessions covered union perceptions of the impact of change on jobs, possible actions in response to change, organising within the new media environment and the part that could be played in new stratgeies for organising by international co-operation.

The preliminary results of the survey showed that journalists and media workers are increasingly isolated and multiskilled. The key words for unions were: adapt, respond and change in order to organise members with changed or entirely new professional profiles.

There was a widespread belief that media unions fail to communicate their message as well as they could and should, and that they sometimes resist integrating or even recruiting younger and less traditional media workers. Differences in the cultures and approaches of unions were sometimes at fault, but there are many problems affecting the job of organising:

- The exploitation of freelances by some employers which increases hostility between them and permanent staff
- The fact that employers are often as confused as everyone else about what is happening within the media
- The degree of centralisation within the media which may affect the ability of unions to negotiate and organise
- The irresponsibility of employers who wish to consult with their employees without engaging with unions
- The politicisation of unions in some countries which can ensure that they do not represent the best interests of all the workers in their industry

The conclusions were that while it may not be possible to control the way that employers or the state operate, but we can certainly address deficiencies in our own organisations. There was a strong feeling that European media unions needed to develop co-operative working and improve the direct flow of information to affiliates and thus to workers within the media and journalism industries. It may be useful to review the structures of media and journalism unions to cope with the continuing development of new areas of work within the media. "Multi-activity working" needs new thinking and new organisation.

Some specific ideas emerged during the discussions:

- To promote new European Works Councils as part of an effort to improve regional and, ultimately, global co-operation.
- To address the failure of industrial classification systems to cope with journalism and media industries as a identifiable group.
- To push for common qualifications for media workers to improve technological understanding and facilitate labour mobility within the media and
- journalism industries at a European level.
- Unions should focus on training to help members understand developments in the media and even enhance their own skills.
- The European federations should facilitate regular updates on international matters using mailing lists and other forms of electronic communications.
- Unions need to learn to market themselves - particularly to workers in the new media. This means understanding what they need and engaging with their professional networks.
- Membership criteria for media and journalism unions should be more flexible without sacrificing coherence in order to recruit atypical and younger-workers.
- Media and journalism unions need to address the issue of dispersed workers who might be isolated within their working lives.

As a result of this process, the EFJ and EURO-MEI issued the following list of recommendations:

Unions should communicate better and integrate all kind of members.

- Education for professional transition should be developed.
- Unions need to reply to the high expectations from members in terms of personal services in a fragmented media industry.
- Unions should trust young journalists and media workers: leadership of unions should integrate more new and young journalists and media workers in order to reflect the changes and make the organisations more attractive.
- Unions should be reactive or even change their traditional way of operating through formal yearly decisions: unions have to adapt to new workers, and not the other way round.
- Transnational dialogue between unions and federations should be reinforced in situations where national unions cannot tackle issues properly on their own.

CONCLUSIONS

The media and journalism industries are going through a period of deep transformation which is raising critical issues for unions representing workers in these industries. The members of EFJ and EURO-MEI affiliates who responded to our survey question to "Please comment briefly on the major changes you have experienced in your working life", whether Francophones or Anglophones, were dominated by comments about declining quality, collapsing standards, increased pressure of work, the demand to keep up with technological change, the speeding up of processes, the increasing influence of financial concerns in the way companies are run, and the rise of ignorant and venal management. Similar attitudes could even be detected in many of the responses of younger journalists and media workers who had detected these trends in the newer media, and we cannot legitimately ascribe such views to the reactionary attitudes of an older generation. Indeed, a minority of the responses were positive. Change for this minority had been for the good. What we cannot deny is the fact of change.

Mapping this change is a difficult task, because it is happening with growing rapidity and much of it is occurring on the margins of the established media. And mapping change it is not a neutral activity - it is designed to help media and journalism unions change themselves.

Approaching the task through unions is contradictory. Unions are, by their very nature, reactionary. They have been organised to protect workers from change which is almost invariably designed to increase their exploitation. To ask union activists and officials to consider how they might change themselves is, in some senses, self-defeating.

Unions have developed in response to factory organisation and coherent enterprises, and we were looking at an industry that is increasingly characterised by isolated or mobile workers and by global and often dispersed enterprises, all held together by the glue of financial management. Increasingly, the growth of freelancing in much of the media and the "financialisation" of companies threaten traditional union models - freelancing moves the workforce away from the enterprise, while financialisation moves the enterprise away from production and distribution. The case of the computer and video games (CVG) industry is instructive. It comes as a surprise to many who consider CVG to be a cottage industry that it employs few freelances. In a sense the whole industry is freelance - it is rootless and mobile, changing locations and allegiances at the drop of a hat. Workers may be employed, but their terms of employment impose no duty of care upon the employer. Computer games businesses, like many transnational media corporations and the new breed of "content aggregators" like Google, Apple and Amazon, have little sense of belonging to a community or a place. They are driven by concern for their investors, and organised increasingly as if they were trading nations of the imperial age - go where they want, buy what they need, and sell wampum to the natives.

In the face of such reality, journalism and media unions will have a difficult task. It may be no overstatement to say that if they don't match up to it, they will surely die.

Our research, and the debates and discussions it has generated, were intended to help the unions affiliated to the EFJ and EURO-MEI equip themselves for their task by identifying trends in the media, what the barriers to change are, and what must be done to organise and empower workers in the new media world.

"In the face of such reality, journalism and media unions have a tough job ahead. It may be no overstatement to say that if they don't match up to it, they will surely die."

We have identified certain key aspects of change that describe the terrain:

1. The tendency of conventional media enterprises towards concentration of ownership and monopoly control
2. The tendency of global "mega-media conglomerates" to go through periodic waves of consolidation and diversification
3. The fragmentation and de-skilling of processes and jobs traditionally associated with the media
4. The emergence of transnational "content aggregators" like Google, Apple and Amazon
5. Continuing technological and market convergence and the growth of hardware and telecommunications companies who purvey media content
6. The increasing need for established media companies to exploit entrepreneurial individuals and small creative businesses in the pursuit of intellectual property

And certain features of the media environment which reflect Government policy and market factors such as property prices

1. The clustering of media enterprises in or close to capital cities or major metropolises
2. The "combined and uneven development" of the media sector in different countries
3. The difficulty in identifying the nature and size of the media sector in any country

These trends and features underpin the recommendations made by the "Mapping Change in the Media & Journalism" conference in May 2012, and other recommendations of this report.

APPENDIX A

MAPPING PROJECT: *QUESTIONS FOR EFJ AND EURO-MEI AFFILIATES*

1. INTRODUCTION

You have received this short questionnaire as part of a joint research project on behalf of the European Federation of Journalists [EFJ] and the European Media and Entertainment International [EURO-MEI] to map employment changes in the media concentrating on the impact of developments in new or digital media. You may know about this project already. We are particularly interested in how new media may have resulted in the creation of new or unconventional media enterprises and jobs. We are looking at France and the UK in order to develop a model based on comparative data. A French- language version of this questionnaire will also be distributed.

I would appreciate any statistical data or research findings you might be able to include in your answers and, where you are asked to assess the extent to which something has happened, please use the following classification, if possible: no change, a little change, moderate change, great change. I intend to contact you by telephone in early January – or come and see you - in order to talk through the questions. You may want to talk to your colleagues about the answers before then. Please let me know whether a phone conversation or a face-to face meeting would be preferable, and let me have an idea of your availability in the first two weeks of January.

2. NAME, TITLE AND ROLE

Could you let me have, for the record, your name and job title and a brief description of your relevant role or roles and responsibilities?

3. OVERVIEW

I'm interested in hearing your views about what is happening to the media in general terms in your country and how you believe this relates to global developments.

4. CONVENTIONAL EMPLOYERS ('EMPIRES')

i) Have the established media companies that you or your union deal with been hiring or firing employees and in what areas in particular have the changes been most significant?

ii) Can you identify the extent to which established media companies have a) consolidated within the country, b) become absorbed into global organizations, or c) expanded through investment in foreign companies?

iii) Has there been a change in a) the way workers are recruited, b) the qualifications that employers seek, or c) the degree to which freelance labour or short-term flexible contracts have replaced traditional employment?

iv) Is union membership as a proportion of the workforce increasing or decreasing in established media companies?

v) In your opinion, to what extent have established media companies in your country a) moved into new media areas, b) adopted new working practices, c) sought refuge in alliances and joint ventures, or d) retrenched?

5. NEW DIRECTIONS ('INVADERS')

i) Can you identify companies in your country, whether in domestic or foreign ownership, which have entered the media or journalism industries – for example, telecommunications companies which have developed media or journalism operations by internal investment or takeover? Please indicate, for each, their original area or areas of activity and the nature of their media or journalism operation or operations.

ii) To what extent are such companies engaged in the production of original content?

iii) Are these companies unionised? Are their media or journalism operations unionised? Can you give an indication of the union membership as a proportion of the workforce? Is your union recognised or does it intend to seek recognition?

iv) Do you know a) how these companies recruit for their media or journalism operations, b) how wages compare with their competitors among established companies, c) the qualifications that these companies seek among their employees, and d) the degree to which they rely on freelance or short-term flexible contracts?

v) In your opinion, to what extent do these companies a) compete with established media or journalism companies, b) adopt new working practices, or c) operate globally or internationally?

6. THE CHALLENGERS ('SETTLERS')

i) How many of your members (and what proportion of the total membership) work for small or micro-businesses – including individual freelances to companies employing ten people or fewer?

ii) Is this number rising or falling?

iii) What areas of the media or activities do they operate in? Do you have a breakdown of such members by occupation/activity and if so does it distinguish between new and traditional media? Job titles might include website designer or developer, blogger, database journalist, PR/marketing/Search Engine Optimisation consultant, podcaster/podcast producer (audio and video), graphic designer, photographer/videographer, developer of 'apps' for smart phones, games developer, writer, editor, subeditor, sound editor, video editor, producer, technician?

iv) Do you have figures relating to the annual remuneration of individuals or annual turnover of small or micro-businesses?

v) Do you have any figures relating to the geographical locations of these people?

vi) Do you actively recruit among new media freelances and micro-businesses and, if so, how do you go about it?

vii) Do you have figures relating to what these people were doing or for whom they were working immediately before they started out as freelances or launched or joined micro-businesses?

7. UNION REPRESENTATION

What specifically new media related issues do you deal with in order of importance (eg. disciplining related to social media usage, remuneration, conditions of work, copyright, moral rights) and does this work represent a growing proportion of the activities of union officials?

8. RECRUITMENT AND RETENTION OF UNION MEMBERS

Do you have a recruitment and retention strategy for workers in new media? If so, can you explain it? If not, why not?

9. THE PROJECT

What do you want this project to achieve and what would you like to learn from it?

10. LIST

We will be distributing a questionnaire about these matters. Could you provide us with a list of companies - and, if possible, contact details - which in your opinion we ought to approach?

11. THE FUTURE

How do you believe the media landscape in your country and globally will look in five years time?

APPENDIX B

SUMMARY OF MAIN SURVEY RESPONSES (AUGUST 2012)[51]

UK		**La France**	
Respondents 563/77%		Repondents 168/23%	

Q.1 What country do you most often work in? | **Q.1 Dans quel pays travaillez-vous le plus souvent?**

France	1%	83%	La France
UK or Ireland	88%	0%	Royaume Uni
Other*	11%	17%	Autre*

(Q.2 What is your name? / Votre nom et prénom? | **Q.3 What is your e-mail address? / Votre adresse courriel?)**

Q.4 Please select your age group | **Q.4 Votre tranche d'âge?**

16-25	5%	5%	16-25
25-40	33%	37%	25-40
40-55	44%	39%	40-55
+55	18%	20%	+55

Q.5 Select your sex | **Q.5 Votre sexe?**

Female	38%	51%	Feminin
Male	62%	49%	Masculin
Transgender	1%	1%	Transgenre

Q.6 Educational qualifications | **Q.6 Niveau d'études**

No qualification	3%	3%	Aucun diplôme
Vocational qualification	23%	7%	Études professionnelles
GCSE/A-level, Baccalaureate	43%	31%	Baccalauréat (L, S, ES, professionnel etc.)
First degree	47%	32%	Licence universitaire
Postgraduate diploma	18%	6%	Certificat d'aptitude
Postgraduate degree	19%	68%	Autres diplômes universitaires ou études supérieures

Q.7 Are your qualifications relevant to your main area of work? | **Q.7 Vos études ont-elles un rapport avec votre travail principal?**

Yes	64%	73%	Oui
No	33%	26%	Non
No qualifications	3%	1%	Aucun diplôme

[51] Responses have been tabulated for easier comparison. Where respondents have been invited to write in their own responses ('Other/ Autre'), the responses have been analysed and where appropriate used to adjust the analysed percentages. Adjusted figures are shown in brackets - like this: (27%) - next to the unadjusted figures. The phrases 'UK responses' and 'French responses', or variants of them, are used to refer to responses appearing on the original English or French language questionnaires.

Q.8 Did you work in another area before moving into journalism or media? / Q.8 Avez-vous travaillé dans un autre secteur avant d'entrer dans le journalisme ou les médias?

Yes	46%	40%	Oui
No	54%	60%	Non

Q.9 Please identify the area you were working in votre prior to your move into journalism or the media. / Q.9 S'il vous plaît identifier la zone que vous travailliez dan déménagement avant dans le journalisme ou les médias.

Manual work	9%	7%	Travail manuel
Manufacturing	3%	11%	Industrie
Service industry	16%	18%	Services
Teaching	9%	12%	Enseignement
Medicine	2%	5%	Médecine
Science or technology	9%	9%	Sciences ou technologies
Law	2%	0%	Droit
Finance, banking or accountancy	4%	2%	Finances, secteur bancaire ou comptabilité
General management	4%	2%	Gestion
Other**	42%	35%	Autre**

Q.10 Please identify how you moved into journalism or the media. / Q.10 S'il vous plaît identifier comment vous avez déménagé dans le journalisme ou les médias.

Retraining	33% (43%)	7% (16%)	Reclassement
Freelancing	31% (33%)	49% (58%)	En freelance
Internship	8% (32%)	12% (26%)	Comme stagiaire
Other ***	28%	32%	Autre ***

Q.11 How long have you worked in the media or the creative industries? / Q.11 Depuis combien de temps travaillez-vous dans les médias ou dans le secteur de la création?

0-1 year	4%	2%	Moins d'un an
1-2 years	3%	5%	1 à 2 ans
2-5 years	10%	18%	2 à 5 ans
5-10 years	15%	14%	5 à 10 ans
10+ years	68%	61%	10+ ans

Q.12 Are you: / Q.12 Êtes-vous:

A staff member (full-time)?	50%	42%	salarié (en CDI) - à temps plein?
A staff member (part-time)?	5%	5%	salarié (en CDI) - à temps partiel?
A freelance (including casuals)?	41% (43%)	38% (50%)	freelance (y compris pour un travail intérimaire)?
A contractor?	5% (5%)	12% (12%)	contractuel (CDD, CDU)?
Other? ****	4%	16%	Autre? ****

Q.13 If you are employed, how long have you worked for your current and previous employer? / Q.13 Si vous êtes emploIyé, depuis combien de temps travaillez-vous pour votre employeur actuel et pendant combien de temps avez-vous travaillé pour votre employeur précédent?

<3 months	7% (current)/	6% (previous)	2% (actuel)/	3% (précédent)	moins de 3 mois
3 months - 1 year	8%	/ 22%	10%	/17%	3 mois à un ans
1 year - 5 years	23%	/43%	25%	/45%	un an à cinq ans
>5 years	63%	/29%	63%	/35%	plus de cinq ans

Q.14 If you are a freelance or a casual, how many employers or clients do you work for on a regular basis?

Q.14 Si vous travaillez en freelance ou comme intérimaire, pour combien d'employeurs ou de clients travaillez-vous de façon habituelle?

None	11%	8%	Aucun
1	13%	27%	1
2-5	55%	60%	2-5
5+	21%	5%	Plus de 5

Q.15 If you are a contractor, what has been the average length of your contracts over the last five years?

Q.15 Si vous êtes contractuel, quelle a été la durée moyenne de vos contrats ces derniers cinq ans?

Up to 3 months	41%	21%	moins de 3 mois
3 months to 1 year	34%	17%	3 mois à un ans
1 year to 5 years	12%	21%	un an à cinq ans
More than 5 years	13%	41%	plus de cinq ans

Q.16 Where do you work? (all that apply)

Q.16 Où travaillez-vous (toutes les cases)?

Greater London	47%	Ile de France	37%
North West England	20%	Pays de la Loire	14%
South West	12%	Aquitaine	7%
West Midlands	10%	Bretagne	6%
South East	9%	Provence-Alpes/Côte d'Azure	5%
South Wales	8%	Rhône-Alpes	5%
Yorkshire & Humberside	8%	Midi-Pyrénées	4%
West of Scotland	8%	Bourgogne	3%
East of Scotland	6%	Champagne-Ardennes	3%
Ireland	6%	Haute-Normandie	3%
North East England	6%	Nord Pas de Calais	3%
East Midlands	5%	Limousin	3%
East of England	5%	Alsace	2%
Northern Ireland	5%	Auvergne	2%
North East Scotland	4%	Corse	2%
Highlands & Islands	3%	Basse-Normandie	1%
North Wales	2%	Picardie	1%
Other!	15%	Lorraine	1%
		Franche-Comté	1%
		Poitou-Charentes	1%
		Languedoc-Rousillon	1%
		Centre	1%
		Autre!	19%

Q.17 What media do you work in? (all that apply)

TV	56% (58%)
Online (websites)	33% (35%)
Print	28% (28%)
Radio	21% (22%)
Film or digital film	18% (18%)
CD, DVD or other recording (video)	5% (6%)
Online (apps)	3% (3%)
CD, DVD or other recording (music)	3%
Online (games)	2%
CD, DVD or other recording (games)	0% (actually, 1 respondent)
Other!!	9%

Q.17 Dans quels médias travaillez-vous? (toutes les cases)

La press écrite	65%
En-ligne (sites web)	37%
La télévision	25% (27%)
La radio	16% (18%)
En-ligne (apps)	2%
Film ou film numérique	1%
CDs, DVDs ... (musique)	0%
CDs, DVDs ... (video)	0%
CDs, DVDs ... (jeux)	0%
En-ligne (jeux en-ligne)	0%
Autre!!	5%

Q.18 What are your main areas of work? (all that apply)

a) Writing (features, reportage, script/ storyboard, books, PR, advertising)	39% (43%)
h) Producing, planning or project management	27% (28%)
f) Videography, animation or video editing	23% (27%)
d) Sound recording, engineering or editing	19% (19%)
e) Content management	18%
b) Subediting or copy editing	17% (17%)
i) Social media marketing, social media management or community management	14% (15%)
c) Photography, photographic processing or picture research	12%
g) Directing	12% (12%)
m) Design or graphics	10%
k) Commissioning or editing	9% (9%)
p) Ancillary services (secretarial, technician, makeup artist, construction, etc)	8% (12%)
n) Performance or presentation	7% (9%)
o) Marketing and search engine optimisation (SEO)	6% (7%)
r) Assistant or deputy	5% (5%)
j) Coding, web development	5%
l) Database journalism, data analysis and infographics	3%
r) Music composition, arrangement, copying or performance	2%
Other!!!	20%

Q.18 Quels sont les secteurs principaux de votre travail? (tous les secteurs)

a) Écriture (features, reportage, scenarios, livres, communication, publicité)	67% (69%)
b) Rédaction ou secrétariat de rédaction	52%
c) Photographie, traitement de photos, recherche d'images	26% (27%)
d) Enregistrement de son (comme ingénieur ou rédacteur)	19%
e) Gestion de contenu	17%
f) Vidéographie, animation ou rédaction de videos	16% (17%)
g) Direction	10% (11%)
h) Mise en scène, planification ou gestion de projet	8%
i) Marketing de médias sociaux, gestion de médias sociaux ou gestion de communautés	8% (8%)
j) Encodage, développement web	6%
k) Commande (déploiement) ou rédaction	6%
l) Journalisme de bases de donnée, analyse de données et infographie	5%
m) Design ou graphique	5% (7%)
n) Performance ou présentation	5%
o) Marketing ou optimisation de moteurs de recherche	
p) Services annexes (secrétariat, technique, maquillage, construction, etc)	1%
q) Assistant ou adjoint	1%
r) Composition musicale, arrangement, copie ou performance	0%
Autre!!!	9%

Q.19 Who is your main current employer? (Freelances should list up to three clients.) See list below !!!!

Q.19 Quel est votre employeur principal actuel (les freelances devraient spécifier jusqu'à trois clients)? Voir la liste ci-dessous !!!!

Q.20 Please identify the size of your employer's enterprise. Q.20 Votre employeur

Large public sector enterprise	40% (44%)	25%	Une grande entreprise du secteur public
Small-to-medium public-sector enterprise	2% (3%)	2% (3%)	Une petite à moyenne entreprise du secteur public
Small public-sector business	2%	0%	Une petite entreprise du secteur public
Large private sector enterprise	15% (16%)	20% (20%)	Une grande entreprise du secteur privé
Small-to-medium private enterprise	10%	15%	Une moyenne entreprise dans le secteur privé
Small private-sector business	12%	17%	Une PME dans le secteur privé
Micro-business	13%	18%	Une petite entreprise
Other #	6%	4%	Autre #

Q.21 If you work in a group (for example, a production or editorial team), please indicate its size

Q.21 Si vous travaillez en équipe (par exemple, dans une équipe de production ou de rédaction), veuillez donner sa taille

Up to 10 people	54%	54%	jusqu'à 10 personnes
Between 11 and 50 people	32%	30%	de 11 à 50 personnes
Between 51 and 100 people	9%	11%	entre 51 et 100 personnes
Over 100 people	5%	4%	plus de 100 personnes

Q.22 Please indicate your average annual earnings.

Q.22 Quel est votre salaire annuel?

£0-10,000	9%	14%	jusqu'à 10,000 €
£10,001-25,000	26%	34%	10,000-25,000 €
£25,001-40,000	38%	25%	25,000-40,000 €
£40,001-55,000	13%	14%	40,000-55,000 €
£55,001+	6%	5%	55,000+ €
I do not wish to answer...	9%	9%	Je ne veux pas répondre...

Q.23 Which union do you belong to for negotiating purposes?

Q.23 A quel syndicat adhérez-vous?

BECTU	62% (63%)	None	62%
NUJ	22% (23%)	SNJ	15%
SNRT-CGT	0% [1 person]	SNJ-CGT	12%
USJ-CFDT	0% [1 person]	SNRT-CGT	5%
None	9%	USJ-CFDT	1%
Other ##	6%	Autre ##	5%

Questions for respondents identifying as union members
(For comparison, non-union members' responses are shown in square brackets: [ ].)

Q.25 Why did you join your union?

Q.25 Pourquoi avez-vous adhéré à votre syndicat?

I believe in the aims of trade unions	70% (71%)
To improve my earnings or working conditions	33% (37%)
To defend my job	28% (30%)
I was persuaded by a fellow worker or union representative	16% (17%)
To help me network	14% (14%)
I needed representation or legal advice	12% (12%)
It was compulsory	5% (5%)
Other ###	10%

Je crois à la mission des syndicats	77% (85%)
Pour améliorer mon salaire ou mes conditions de travail	23%
J'avais besoin de me faire représenter ou d'un conseil juridique	19%
Pour prendre contact avec d'autres collègues	19%
Pour sauvegarder mon emploi	15%
Sur les conseils d'un collègue ou d'un représentant syndical	8%
C'était obligatoire	2%
Autre ###	8%

QUESTIONS FOR ALL RESPONDENTS.

Q.34 To what extent have the following had an impact on your work or working life? (Left-right: immense > not at all)

Q.34 À quel point les éléments suivants ont-ils influé sur votre travail ou sur votre vie professionnelle? (Gauche-droit: énormément > pas du tout)

The internet	30%	6%	2%	1%	61
The digital revolution	31%	9%	4%	2%	49
The current economic/financial crisis	35%	25%	6%	3%	32
The development of smartphones, portable media players and tablet computers	25%	26%	14%	9%	17
Technological convergence	40%	22%	7%	7%	33
Multiplatform working	32%	25%	13%	10%	22
High definition television	21%	21%	15%	27%	-12
Government policy for the arts, media and creative industries	24%	26%	17%	18%	-11
Multimedia storytelling	25%	26%	17%	20%	-14
Computer & video games	7%	16%	26%	49%	-46

71%	25%	4%	0%	1%	71	L'Internet
38%	37%	14%	3%	8%	35	La révolution numérique
32%	31%	24%	6%	7%	26	La crise économique et financière actuelle
18%	28%	19%	15%	20%	13	Le développement des smartphones, des consoles de médias portables et les tablettes
10%	39%	23%	11%	17%	-29	La convergence technologique
8%	9%	11%	20%	52%	-44	La politique d'État pour les arts, les médias et les industries de création
7%	22%	24%	15%	33%	-26	Le travail sur plusieurs plateformes
6%	5%	21%	20%	48%	-43	Storytelling par multimédia
3%	3%	5%	11%	78%	-75	Les jeux videos et PC
2%	8%	8%	14%	69%	-67	La télévision haute définition

These results have been sorted in descending order of score for the 'immense impact' rating. This is almost identical with the reverse of the 'not at all' rating. The spread (envergure) in the righthand column of figures (in bold) shows the gap between highest and lowest scores, and assumes a negative value when the highest is to the right of the lowest. It indicates the relative importance of the topics. While it's clear that there is equivalence in the UK and France over certain issues - the importance of the internet, the digital revolution and the current crisis, for example - it's equally clear that there are differences. These are partly due to the different pace of change in the UK and France but also to the different composition of our UK and French respondents. Games and new phone and platform technologies are marginally more important to the UK respondents than the French, which indicates the degree to which journalists dominated the French results and other media workers dominate the UK results. That said, Figure XXX below - which maps responses to coloured areas in the diagrams - gives a good impression of the similarities and differences between the replies from the UK and French respondents. It shows that the perception of the impact of different technological and socio-economic developments follows an approximately similar pattern in both sets of respondents. The deviation in UK responses (left) is significantly lower than in the French responses (right), but the peaks and troughs coincide.

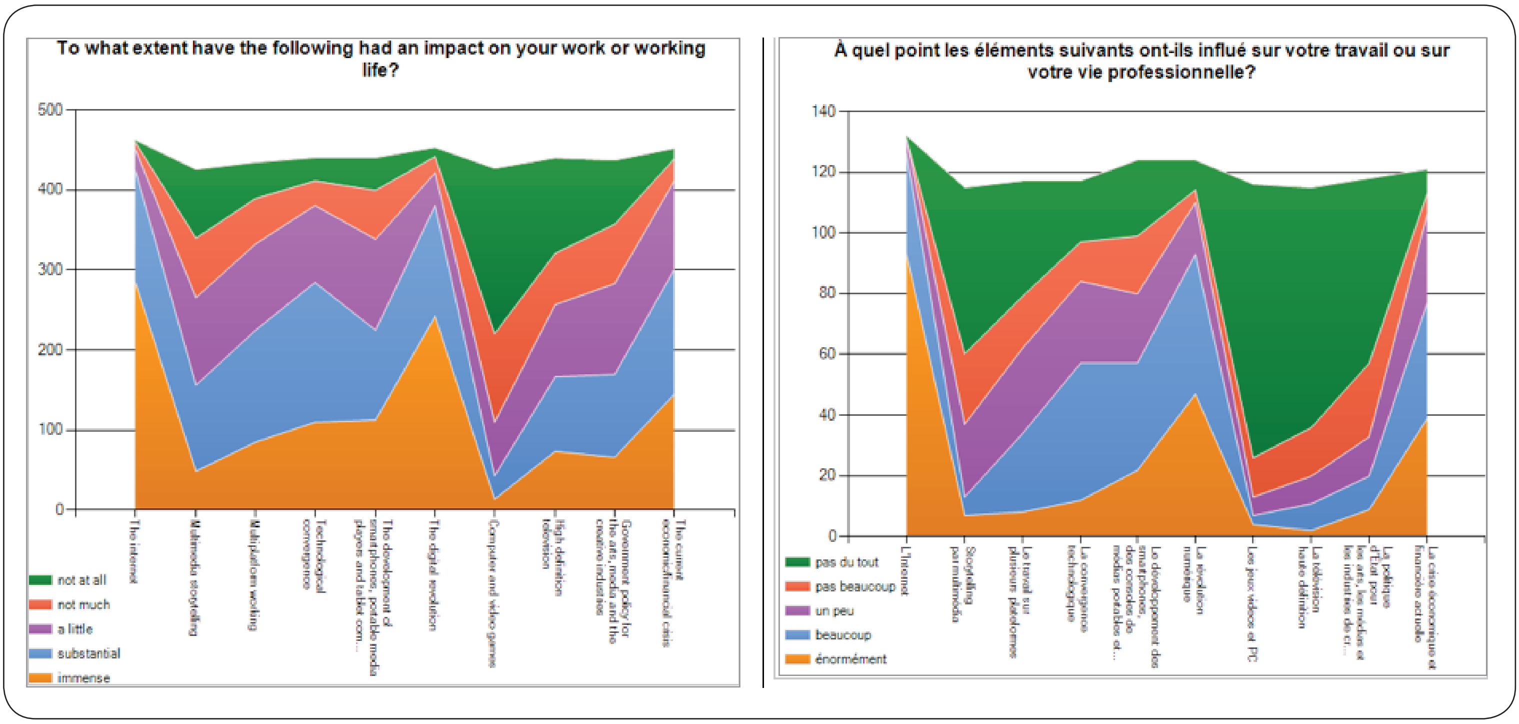


__Fig.22__ - The impact of different technological and socio-economic developments as perceived by respondents in the UK (left) and France. The coloured areas indicate the number of respondents who rated the developments according to the legends in the figures (number answering).(Source: survey)

Q.35 - Please comment briefly on the major changes you have experienced in your working life.

RESPONSES LISTED UK

Showing 252 text responses (45%)

- spending much time in front of the computer
- The quality of the product (news, video, events) have been reduced.
- I still enjoy my work but find that some production companies expect the same high standards within a smaller budget .Overtime payments and holding onto your 11 hour break on tough schedules can be difficult.
- Our duties in our existing roles have increased with no extra time to do them, and with less staff, and for the same salary and with less programmes budgets to make programmes which has affected the quality of the material we are able to produce. It has also meant on a personal level I am unable to make the types of programmes I would like, for a example a programme I used to make called "give me a Voice" which aired issues and campaigns of the public and was well received and award winning, despite it still being very cheap to make, the budgets could not afford to keep this in the schedule and we are now making very simple one- to - ones which I belive are not as fulfilling for the audience and not fulfilling for me as a producer to make.
- The sell-out of the individual to the corporate
- Left public sector following bullying, went freelance. Then NUJ supported me during ten years of illness following an accident.
- Thanks to changes in the attitudes and values of media owners and in technology, words and pictures from professionals have been devalued.
- Internet and electronic comms.
- Technology or taking it head on and working with it to make it work for me has really worked. Everything is for online these days. If people don't realise this they are screwed. Being smart, in a unions and valuing your work esp as a freelancer is soooo important.
- Been made redundant at previous job due to funding cuts.
- Biggest recent change was going from freelance (after almost 30 years) to permanent staff just over two years ago. Major long-term changes: introduction of computers, email and internet.
- From typewriters to Ipads
- I don't want to fight progress, I want my employer to work with me so that I can increasingly make a useful creative contribution with new tools. I have a lot of experience and ideas to offer.
- Much more freedom to write.
- Watched most animation companies go bust, one after another.
- Move from Televison Centre to Media City
- Started as a journalist at regional tv news station (YTV) 17 years ago with sounds recordists, craft cameramen and editors - now I do everything myself.
- Outsourced from Channel 4 TV to Red Bee Media
- The recession and the reallocation of government and Foreign Office funding has had a devastating effect on the BBC World Service.
- Fewer staff to do the same job. More emails than I can cope with.
- Developed my acting ability through community theatre in 2003 before becoming professional in 2005.
- The collapse of advertising revenue has completely altered the business model for regional newspapers and cost countless staff journalists - and others - their jobs.
- Clients not wishing to pay for quality content in the belief that they can do it themselves. They may have the equipment but not the journalistic ability or production skills to produce compelling and revelant content.
- Less work available now due to financial crisis. Work is also less predictable/reliable and I live month to month on a fluctuating income. The internet has not changed what I write, as I still work in print, however the net has changed the way I do my work - it's an excellent resource for research purposes.
- Worked for a major employer for 18 years (BBC), then was made redundant last year. Now working freelance.
- I have had to completely reskill. The NUJ were key in helping me do that. I've now moved into film and have joined BECTU too. I can't emphasise how helpful both have been in getting me training and developing networks.
- Move towards consumerisation of broadcast technology. IT & Broadcast convergence. Skills reduction of end users as technology has simplified
- With a working life spanning 37 years, I have moved from manual typewriter and copy paper with carbon, to computers and internet. I also moved from hot metal printing methods to computer layout. The changes are so enormous they are impossible to summarise

- The move from print to online and the fall in advertising revenues.
- Post has changed from being mainly a traditional librarian's job (with tapes instead of books) to the role of media manager, with responsibility for managing the archiving of computer clips using DIVA system plus the day-to-day mangement of the server, enabling sufficient capacity at any time.
- Since I became a journalist the Internet has completely taken off. Now, it is as important as our newspaper. The financial crisis has resulted in numbers of reporting staff dwindling, offices being closed, newspapers being merged, no pay rises, pernanent senior reporters replaced by trainees on freelance contracts and a complete lack of investment by Johnston Press in its products.
- 30 steady, successful years until 2010 when my income was slashed 75% by economies on the paper I write for. Am now scratching a living.
- Briefly? Not possible.
- I'm expected to do more. Technology has enabled me to do more and raise quality. When I started equipment and skills seemed fixed, now it is always changing.
- Keeping up with technology has been difficult
- Nothing especially original. Years ago, "executives" relied totally on typists / secretaries for typing of memos and letters: now, with the advent and universal development of PCs, virtually everyone is assumed to have acquired some facility in typing and we all spend half our time typing EMails etc etc. Generally a good development but EMails and other electronic media, together with an obsessive preoccupation with "communication", mean we spend (i.e. waste) too much time in unproductive activities.
- I was made redundant last year and am setting up my own PR and media consultancy.
- My earnings have fallen by 2/3 over the year. I have not received a pay rise in over ten years. My working hours have increased but the pay remains the same. There is an overwhelming feeling of apathy in the industry. Advances in technology is costing jobs. The industry is not properly regulated and too many unqualified people are taking the work. There is an imbalance between the employment of local talent with the drafting of people from the south. Productions are allowing the natural apprenticeships of some grades to be eradicated therefore costing jobs. The hours expected to work are damaging for health and safety and the welfare of family life.
- My income has remained virtually static for a decade. Overtime is now almost unknown.
- Technological advancement; erosion of responsibility and editorial control;
- There has been a move away from specialisms, which senior management appear to fear, which has undoubtedly led to dumbing down. For example, the research dept has all but disappeared whilst production teams have been given online research tools, which is like giving everyone a claculator and getting rid of the accounts dept.
- The move to online content production, this has opened new opportunities and also added a level of complexity in rights negotiations for use of archive/library content
- Among those in power: a shift away from belief in the collective and altruism towards a belief in the individual and selfishness. Evidence: anti-trade union legislation; corporate and individual greed; the 99% being made to pay for the 1%. Internet/digital revolution means my everyday work is totally different from what it was 20 years ago, and it continues to change at great speed. Impossible to describe the changes briey.
- From tape recording with caring management and a personell officer who knew me to digital revolution with remote management and pathetic HR dept.
- I have been made redundant from one of my contractor jobs. However, the economic downturn hasn't necessarily decreased the amount of work rather the daily rates I can now expect.
- The largest change has come in the last few years as employers become able to use students to provide copy for no fee.
- Found I was out of place with the dumbing-down of print media in Cork. Times change, one moves on.
- Changing from journalism as employee to casual work in TV means much lower wages, job security and ability to respond to abusive employment practices and combine trade union duties and the time to get and succeed in my work.
- Quantity replacing quality.
- Outsourcing never saves money
- Redundancy - now moving back towards freelancing after decades away.
- De valuing and down grading of skills
- From the mainstream to the online, from the fulltime to the freelance, last but not least from internet media professional to social media trainer. In sum up, These are major Changes of my life..
- Less pay, bad management
- Smaller budgets Bigger expectations Longer working hours More instability Worse treatment
- The rise of the mobile broadcasting/streaming environment and catering to it's (sic) unique requirements.
- The emergence of the 'vook' or enhanced ebook and the imminent diminution of the role of the broadcasting gatekeepers.

- Casualisation of Work, T&C's etc.
- At the age of 53 I changed careers from manufacturing to a more information based role. 4 years later I changed again and became an Iformation (sic) Architect
- A general drive away from skilled workers and training for individuals and investment instead in technology to replace the skills of people as has been the trend across most employment. The move away from managers who know how television works and instead emphasis on budgetary spreadsheets.
- Programmes must be made increasingly quicker. The preparation time is being squeezed more and more. I believe this has an effect on editorial quality - less ability to find new stories and more reliance on things that have been done before.
- a Major increase in my workload combined with persistant decreasing of time and resources to acieve it by management.Also the increasing appointment of Graduates to the detriment of long term experienced staff.
- I began in journalism 30 years ago on a manual typewriter with traditional paste up print processes the advent of computers and other technology has had a revolutionary effect. My output is probably 3 times what is was when I started out. Not sure the economy has benefited in any way from all this though - I've been through a couple of recessions too and this is by far the worst
- Almost complete abandonment of analogue recording & replay; adoption of networked IT-based technology for audio. Budgets slashed for already efficient operations leading to poorer technical and production quality. Management diktat overriding practical considerations.
- In twenty years I've moved from being a freelance feature writer supplying national and regional newspapers to a company founder and director managing multimedia projects.
- I experienced redundancy just before the financial crisis. I was subsequently ravaged by the financial crisis. I am just beginning to rebuild only now
- The way technology has moved now and into the future. We just have to get the content right and the way we have to communicate as human beings. Technology is there too enhance not to distract. Thank You
- Originally trained as an architect, then researcher, then tutor, becoming University Professor of Architecture. Joined BBC Design Department as Holiday Relief Design Assistant on a new career path. Now my own training courses, funded by Skillset bursaries, and my work as an adviser with Skillset Careers Advisory Service, have both disappeared with Government cuts. Most of my design work comes from abroad, where financial cutbacks have recently restricted my workload.Severe income reduction in last 2 years.
- Decline of print media, where I originally trained has had a major impact. From typewriters with at least a 2 day gap before publication then to computers with overnight capability and now almost instant news online
- During the recession, I witnessed how much an organisation changes, with redundancies etc. Now company is relocating to another office to save money.
- It now appears to be considered mandatory that one person do the job of 3 people for less money and there are no opportunities for training or advancement. Working in the media is now pretty much a dead end job
- The singular cry of 'no budget' therefore constant cutting of staff/material and the driving down of wages particularly in the freelance market
- Social media, digital technology and government policy have had a huge influence on the BBC. Technology has been a revolution, everything is faster, news is 24/7. I do alot of IOutreach work and this has changed as new generations grow up as digital natives. Howwever, I am very aware of those of all ages whio are excluded from the digital workd as they do not have hte internet at home.
- jobs being cut and people having to multi-skill so being taught on various computer programs
- I've recently gone from working at the BBC to becoming freelance. I've only been freelance for 5 months so am yet to experience enough to compare it to being contracted.
- Rates have appeared to have gone down during this financial crisis. In some cases no payment as the company immediately declared themselves bankrupt on completion of the production.
- Working condition have worsened with emloyers demanding longer hours and less H&S
- I'm required to take ever-larger budget cuts. It is now almost impossible to make a programme.
- Technological change and socio-political moves have altered the whole basis of communications and the interactions between audience and producer.
- More automation, faster turnarounds.
- technological advances
- Moving from salaried position to freelance has been a culture shock. Earnings plummeted and workload increased.

- I have moved from Ireland to the UK in the last 2 years - because of the economic situation in Ireland there was little work in the commercial production sector so I moved to London where I have received a lot of work. Moving country is difficult & isolating & very very hard.
- diminshment of terms and conditions (company pension contributions, salary increase, constant re-structuring and change of company management and ownership), move to file-based workflows, HD broadcast technology, move from traditional broad-cast infrastructure to more reliance on IT based solutions... for example “the cloud”
- Less T&E budget therefore less conferencing in general
- Analogue to digital. Standard of training of media producers of the systems they are meant to use is dropping. They are being thrown at the appliactions with regard for their ability to make best use of it.
- Fewer support or specialist staff, producers (radio) have to do it all, from their desk, online. No travelling for stories, all recycled online - lack of money. High computer use and pressured work pace has left me with permanent RSI. Production standards very high, as technology allows us to do more.
- Going from analogue sound to digital; editorial\staff doing craft side of work.
- To do more and more in less and less time (and not only pure journalistic tasks but also technical). It is like i'm practicing two or three jobs (multimedia-journalist-developper...) but i'm not paid more and i don't have more time to do it!
- Whilst getting work hasn't necessarily been harder, average weekly hours have gone up dramatically whilst pay, conditions and benefits have all gone down.
- am moving more from physical content management to digital content management
- Loss of unique specialised skills as trend is for everyone to be multi-disciplined
- I have only been working in television for 2-3 years. however in that time social media has made a dramatic difference in how we communicate with contributors. They are more accessible to us but we are also far more accessible to them.
- Changes due to file based media capture and HD. Financial insecurity due to economic downturn.
- What was a quirky and unique creative multiplatform environment has become overwhelmingly corporate and soulless.
- I used to do work, now I do email.
- Advances in HD technology has lead to higher technical demands in camera department roles. We are now working on 35mm HD cameras, with the same, or higher technical demands as film cameras for televisions money and televisions schedules. Greater time pressure on achieving inflexible schedules means there is less time to achieve a high quality of work and the money paid is not in line with the level of skill required.
- The development of Internet programme pages for TV Programmes has impact on scheduling, staffing, budgeting, etc All TV programming is now being shot in HD which has implications in self-shooting, editing, etc. BBC Licence Fee settlement combined with economic crisis has huge implications on all aspects of production. More emphasis on multi-skilling, doing more with fewer people, smaller budgets as a result of 20% cuts, new ways of working, etc.
- I can't say that technology develepments have massively had an impact on me as these changes were already in place by the time I began working with them
- workload increasing due to company trying to do everything in-house instead of bringing in freelancers. wage freeze for last 3yrs.
- Drastic reduction in both take home pay and especially pensions when taking into account inflationary pressures, government interference, reduced effectiveness of collective bargaining, complete eradication of guarranteed tiered pay structures, and the vast increase in a freelance workforce. Also multiskilling practices degenerating craft skills, which has had a direct impact on the broadcasting output quality. The complete lack of any structured Traineeships within the mainstream broadcasters which, in conjunction with the removal of research and development departments is highlighting why we are seeing such poor quality. Stress levels amongst us all are increasing, and there is virtually no 'fun' allowed within the working environment. When I started out I had tremendous enjoyment and satisfaction and felt valued and respected. I feel sad that any new entrant to our industry will never experience these feelings because they have been indoctrinated to behave as an automaton who should never question the powers that be and accept that the future working environment is that of a sausage factory churning out clips 24 hours a day, and that to get ahead of the game they have to adopt a selfish, self centred attitude with no regard for anyone else.....except the PC police.

- Technological change has not given more time, as once predicted, it has simply pushed deadlines ever tighter.
- Going self=employed and setting up my own company after 30 years in journalism
- expected to work extra hours, no overtime, made to feel guilty about it, corporate brainwashing with very subtle elements of fear used to keep people in line. Better working conditions needed and BSKYB needs to recognise unions more
- major change from analogue (recording on tape) to digital storage and editing, Suddenly many people could access a recording before it finished. Diogital manipulation of audio and video have revolutionised broadcasting
- Budgets are being cut to a level that means you can't perform your job. The advances in moderen technology are not being catered for in training, I mean for those who work in the industry, eg. the use of VFX many who work in TV dont know how to handle it. What to, what it can do and who could do it. We are leaving it to the new people to come in with the skills, yet they really cant break the industry so its a stalemate thats means things slow down in progression.
- The contraction of public service broadcast and the massive growth of independent television production companies
- I began my career in the days of hot metal and typewriters, so the changes I've experienced are too many to list!
- Reduction in pay and conditions. Reduction in opportunities for promotion and self-determination outside percieved and short sighted 'business needs'. Therefore less training and growth and more protectionism of jobs and bookings from senior ranked members of crewing teams and management serving their own agendas without the will to plan or build a viable future for junior staff members in departments below them.
- WIFI/3G laptops and iphones have allowed flexibility to work at base and at remote locations.
- Huge reduction in pay, gradual increase in hours and the de-skilling of the tv industry in the name of profit.
- Huge technical changes from film to tape to digital Use of digital communications
- The downturn and shift away from documentary making particularly on international subjects has changed the market.
- Moving away from majority of tv producing and directing & some teaching towards a majority of time teaching (due to lack of work in TV)
- The current economic, etc, climate in the UK has meant that I have had to relocate to Australia with my family in order to find secure work.
- Basically internet and media convergence rendered many degrees pointless, i.e. anyone can pretty much pick it up and say they can do it. And the industry attitude to not paying means the person who can afford to stick at trying the longest will get ahead eventually, even if they are less qualified.
- Daily Rates have gone down DRAMATICALLY in the last 10-15 years
- I'm starting out as a new entrant into the industry but one of the biggest challenges is the reduction in training funding and job cuts across larger organisations such as STV and the BBC.
- Digital revolution made technology cheap and available
- Technological advances and the need for customers to save money
- Movement to digital from film stock, greater precision and detail in design due to prevalence of HD, keeping pace with emerging technologies in cameras and platforms for finished piece, rise in social networking, paperless department procedures
- Greater use of IT based systems and infrastructure.
- I can't.
- Going HD caused huge budgeting issues in Wales, then S4C's funding was cut making things even worse. It basically led to all programs being made for about 605 the original budget and with half the people on a production team. Basically it's hell.
- Being young I've found it difficult from school since to get decent, inexpensive training in traditional and practical skills (set building, model making, technical drawing)- whilst other skills such as computer and software skills, social networking and the like are 2nd nature and seeing expensive courses offering training in them isn't helpful for people my age in the slightest
- more financial and contractual restrictions (ie, flexible working agreemends have either stopped or involve losing years of service). - We are moving to a less favourable location to save costs. -We now have to pay tax on taxi costs (for shift work). - less flexible working. - New pay structure based on performance. New stringent performance targets. Stats include 'utilisation'.
- I work mainly in the third sector / ngo and the budget cuts left me significantly down both in terms of work and financially.

- Starting my career in the field of computing some 45 years ago the advances in I.T. since that time have created major changes every few months!! Obviously reaching retirement age was a major change but moving into Supporting Artist and Modelling has been a significant change also. Being a member of BECTU helped me understand this new career very well indeed.
- I am definitely working harder and for longer hours, for the same pay than I used to. My earning capacity has not increased in 15 years, but I seem to do more for it.
- the digital revolution
- Working remotely is now second nature for me, as I work from Bristol but manage a team in London and support people across the UK. This wouldn't have been possible 10years ago. I also find that everyone in my organisation now has an awareness of my area of expertise, social media, whereas 10years ago when I started in it hardly anyone did.
- moving away from tape-based systems to fully online/server based systems
- Growth of online delivery of AV content
- Longer hours for no extra benefit. A detrimental effect on work life balance. Change of working conditions to which I have no control over.
- multi skilling having to adapt to new technology.
- Lack of funding for Services. Pay restrictions. Lowering of Brodacast standards. Lowering of respect for technical skils. Learning about corruption and individual agendas within Government, Management and BECTU Reps within the UK.
- Longer hours, less money,higher working costs.
- BBC cut backs - less work for non full time staff
- I started out in regional newspapers just before computers and mobile phones came in. When I freelanced for over a decade my partner and I kept up to date with technological improvements. Now I work for a division of a large regional newspaper group earning more or less the same as I did in 1992 when I left to go freelance. I work on a dialup and am expected to access the internet and upload to our website using obsolete technology. I work in a small district office which is expected to close even though I still have plenty of news stories walking through the door. I believe the quality of material in local newspapers, written and especially photographic, has suffered badly in the last couple of decades. If I could I afford to I would leave the industry altogether.
- Digital technology, increased workload and expectations due to digital technology.financial squeeze in public service broadcasting leading to reduction in quality of output.
- Local office downsized by 50%, major functions of company moved to Continent due to internet &c
- Due to the development of MediaCityUK (Salford Quays)
- Job insecurity due to technological changes related to driving new ways of working to reduce cost of produciton. Also constant restructuring to ensure less people do more at lower cost
- I have gone from being a textile designer/maker to a new media specialist and trainer. The pay, excessive hours and difficulty getting people to pay is about the same over all!
- Employment in the film industry has always been sparce (sic). Six years ago it became necessary to employ myself with associates on innovative projects of my own.
- Changes from a hierarchical training based craft structure to a situation where any one can shoot, record content etc on cheap digital cameras, DSLRs or even their iPhone. I was once paid quite well for what I did, now I feel that I've been left behind in the general economy.
- We are more and more having to give more for less money and resources. Budgets but not expectations get smaller time after time.
- fair and professional itv 1978 to 2004. continual corporate bullying at bskyb 2007 to date
- Introduction of new technology. Reduction in broadcast incomes. Much longer hours.
- technology advances have meant that we now operate our own desks..we Studio manage as well as broadcast so we do double the work that we used to.
- After 20 years as an employee I made the leap to being self employed and run my own limited company now.
- Financial worries, having to get a second job to make ends meet. close to devorce due to money situation. Bullying at work.
- Moving from working with traditional media to digital media - finding it very difficult to keep up with the constant technology changes. As soon as you've learnt something, it's moved on to the next level and you're in the same position of having to start again. Very scary.
- The rate of change is speeding up, making products have more and more limited lifespan
- Tapeless technology & HD production Financial cutbacks, ease of digital production all seems to have led to significant lowering of freelance rates.
- Big migration to different systems. Staff cuts. Rationalisation. Doing more with less.
- Move frpm a paper to an electronic environment. Use of email as main method of working

- The internet 2) Consolidation of the regional press industry 3) Dwindling resources
- My income for the last two years has halved compared to previous years. My main regular client no longer employs freelancers.I am now self editing and self shooting to pick up extra work.
- Emerging technology platforms -multiscreen
- From everything being analogue, physically real, on paper/film to everything being digital and on computers.
- Working for arselickers and skivvies instead of once working for people who knew what journalism is about.
- I now work more intensively, over a broader range of types of work
- More work but conditions, pension and pay stripped back
- Multiskilling. Having to take on board new technologies and working practices very quickly, often with minimal training.
- Work is more cut throat & less rewarding
- I have put down that I have no qualifications, I do but I left school nearly 40 years ago and those that you have put down were not around in those days.
- More competition for less work High definition Budgets squeesed Not always the going Union rate for the job
- Demands from commissioners of more for less is the biggest challenge
- Lack of work
- Digital/computer technology was not used when i started-now 90% of my work day is digital/computer based
- In the area of BBC TV News, the introduction of new home grown technology has been a disaster, and also within the Information and Archive departments
- It can be summed up imply as "hot metal to Mac" with editors who have lost their way when it comes to objective investigative journalism. Sad, but newspaper sales tell their own story.
- budgets and wages for productions go down but this was happening way before the recession. production companies/producers just want a bigger profit!
- it gets worse and more demotivated every month
- Electronic means of communication and privatisation/outsourcing have been the major changes (in the last 40 years).
- Doing more work.
- 40 years in television I`ve seen more changes than I can remember. But the miniturisation over the years and the multi skilling of recent times have had the biggest impact.
- The casualisation of a flourishing industry and the reduction of margins in productions.
- Too many kids doing media degrees willing to work for peanuts and thereby undermining established people. Too much training, not enough work.
- increased work load by way of skills required. Smaller teams, shorter deadlines.
- More work for less money, more stress in the work place, less camaraderie, more isolation.
- Research made easier. Price of technology and accessibility.
- constant changes in technology not supported with proper information/training
- Closing down of BBC TVC in London is and will impact finacially and emotionally.Being sold to Siemens then to ATOS is just as disturbing as you feel that all this is out of our control....and is affecting my prospects especially since I am in my 50's
- The dumbing down of output and craft skills is rampant. It's hidden to some extent by the new technology.
- Most of our material in now on a server rather than on tape. The current financial crisis is effecting the whole of the BBC
- Working harder and longer for less pay
- Less and less staff being asked to do more and more work. Cost cutting. Constant rounds of redundancy. Earning less in real terms. BBC Pensions slashed, even for workers employed for over 30 years.
- More hours less Pay.
- I've noticed that many technical operations which used to be frustratingly difficult have become easier, with more different ways available to do them.
- Personally, I have lived through the time when web content was produced by experts and specialists to an age where, increasingly, it is becoming another multiplatform bow for workers in radio and television. While I agree that multi-skilling is a good idea in theory, I feel that it has meant a decline in the standards of web content.
- Lack of editoriallly aware senior management who do not understand the trade or the needs-interests of the consumer - readers or listeners
- When I first started working in broadcast media, it was compulsory to belong to a union. Now, it's a rarity amongst freelancers. Freelancers in my section seem to overtime for free. There is always the pressure to be the top dog and not make errors. As a temp, you are as a good as your last mistake. When I was full time staff, I felt that I was part of the company's set up. Being a freelancer, it is a more isolating experience.
- I used to physically edit tape. Now everything is done via computer. Once I had and office to myself. Now I have a littles shuffle.
- The technology has changed a great amount; the problems and issues and the way my emloyer deals with them has remained much the same.

- Move from manual typewriters to PCs Arrival of digital page make up Online publications Economic downturn Falling print readership Email and the internet
- The advance of technology has been enormous. Keeping up with new social networks is a challenge, and new platforms.
- More shift changes with little/no notice. Fewer staff members make it more difficult to get leave/time off. Less recovery time between shifts
- Technology has significantly reduced jobs in the sound engineering with the advent of smaller protable devices and computer based editing. The workforce is smaller and more temporary. Conditions of service have worsened. Pay is declining in real terms.
- Moved from tape based linear editing to computer based non linear edititng with far fewer people in the edit suite.
- When I started in newspapers in the 1980s we were still using typewriters but by the time I moved to radio we were using PCs. When I began in radio we were still cutting and splicing our own tape but by the time I moved into TV in the late 90s we were using digital technology. And when I started in TV we were still using staff camera crews shooting on digibeta. Now I mostly self-shoot on HD cards. In otherwords, there has been substantial technological advances throughout my career in journalism over the last 24 years which have totally transformed the way we work. Over the next 25 years I predict technology will continue to revolutionise the newsgathering and programme making process. At various stages in my career these developments have involved quite significant changes to working practices in the news organisations where I have worked. Sometimes these changes have been handled better than others with additional training and support. On other occasions there has been in sufficient assistance and this has caused pressures and stress. In my opinion it is better for employers and employees when technological changes in the workplace are only introduced when staff have had sufficient training and support.
- from staff positions to freelance the break up of the BBC itv Duopoly
- Shift from specialist analogue broadcast technology to non-specialist digital production
- Excessive working hours No meal breaks No support from production Production not understanding their own craft Gross lack of experienced production managers Huge difference in pay between grades (esp between camera & sound!) Powerless BECTU
- a decline in the value placed on craft quality at the BBC. Technological advance. Govt. policy re. uk media.
- From legacy media (print) to online and converged platforms. the end of elite journalism and new relationships with consumers.
- Casualisation of whole industry. Reality of 'Health & Safety' & 'Working Time' and 'Holiday Pay' being the opposite of legislation.
- The expectation from employer that overtime should be unpaid, and that one should be willing to work more flexibly to the point where it becomes difficult to have a social life. In the past overtime was always paid and hours were rostered, except for in an emergency / for breaking news story - which I find acceptable. We used to be staffed to deal with the unexpected, but now there is minimum staff so there always seems to be some "emergency" which means changes in working days or hours.
- devaluation of craft skills
- I have always been flexible in my working. As a director I was an early adopter of self-shooting and self-editing. I have made my specialist area interactive media and so have been, thankfully, ahead of the curve. I have tried to establish myself as 'knowing and understanding' about new media. Hopefully thgis positioning will continue to work. I have moved from TV to education and now to advertising as the major sources of funding have moved. The rise of the internet has meant my personal interest in interactive storytelling has become mainstream.
- I've worked in the industry for 39 years starting on 16 & 35mm film, then various video formats now shooting on memory cards and non linear editing! Couldnt imagine this back in the 1970s. Smaller crews, more multi skilling etc
- The ever changing work flows. Jobs I used to do do not exist now
- Vascillating government policy; obstructive workforce practices; a lack of imagination - and confidence - from clients. Too many chiefs, not enough .... And it's all getting a lot worse. (No-one has any fun any more)
- in q29 i have not answered truthfully because i do not agree with many of the column headings for the category / question asked. please give your respondants a less of a 'course' scale. has this survey been completed, as a test, but 'normal' peopole and not just associates of the designer? i suspect not. thank you.
- A drastic change in the tools I use - from cutting film to cutting on a computer. But the essential storytelling skills I need and possess have always stayed the same.
- Changes in no's of people making programmes. The need to multi task. Technology, technology, technology. Lack of budgets. Less quality work available.

- Going into - and out of - PR
- There's a huge difference betrween 'substantial' and 'a little' - you should have provided somewhere between these two choices.
- Having worked in newspapers for 35 years this year, I have seen immense changes - from hot metal to computerised production. Too many changes to list!
- As well as writing, sub-editing and taking pictures, my job now involves uploading stories, pictures and video to the web. I also look after Facebook and Twitter accounts.
- Leaving an established journalism company with a full-time contract and becoming a freelancer and teacher
- I have been a freelancer for 20+ years, mostly based in or around Belgium and Brussels. Back in the 90s there was a lot of work here. But in the last 5 years in particular it has diminished, and in the last 2 years in particular work has dropped off a cliff. This is partially my fault I suppose, because I'm reluctant to drop my daily rates to a level I consider good enough only for a trained monkey, and which do not recognise the added value brought to the public or any marketing effort by good writing, good journalism or any kind of high-quality communications. I consider it part of the Union's (and my) job to keep rates at a level that enables people to earn a living, and if that means walking away from jobs sometimes then so be it. But it has meant making a lot of compromises in terms of reduced international travel, holidays on the cheap, etc. The problem is that I don't see any chance of things changing for the better. If and when European economies do pick up (in say ten years or so after we've all had a few changes of government), so many people will have given up and left the industry that companies will not be able to find the kind of content quality that used to be normal. As Jeremy Paxman sometimes likes to say, 'and just to depress you further ...'. I'd like to hope that I'm wrong in this assessment, but I fear that I'm right. And I don't really have any solution ...
- From when I started in journalism the changes in working practice have been vast. From the days of phoning football match reports to a copy taker to the use of laptops is a world apart. I fear that within five years newspapers will be a thing of the past.
- After going to university as a mature student to train to become a journalist, I have found it very difficult to get a job. I do not want to work in London, but jobs in Hampshire are few. So, I find myself having to do an unpaid internship to increase my experience and diversify my skills.
- The closure of newspapers due to cutbacks took me into education where further cutbacks made me unemployed/dependent on short-term contracts
- I trained as photojournalist and documentary maker in the 1970s but could make my career start (e.g. editors would not even look at my images and the BBC said that I was over-qualified to join them). After five years banging my head against that wall I retrained into IT. 30 years later the digital age has brought IT and media together and I finally kicked off my career at age 58...
- As Greek foreign correspondent in London I experienced massive salary reduction due to financial crisis.
- From typewriters to Twitter, carbon copies of stories to computers. Self shoot,self edit, from meeting people to sourcing stories to the social network.
- Major change has been the constant downgrading of journalists' standing while, at the same time, being asked to adapt to ever-changing working practices. It is now 27 years since we have had a wage rise that has even matched inflation. I have concerns about maintaining the quality of journalism because of this
- Changing audience behaviour and the fragmentation of the media market means that I have had to help independent media reach financial sustainability in transition and post-conflict countries and help media businesses in the West get real.
- The internet and multimedia tools create new ways to tell stories
- No chance to progress as no-one moving on and no-one else hiring new staff as before always a fluid profession with lots of options and security
- TV reporting has been transformed by technology bcs now we feed by bgan/internet. The Satphone and bgan are the most important technological advances.
- Getting an internship increased work chanced/learning more than university course
- Much more emphasis on live coverage, online content, video, SEO etc
- From ordinary typewriter (1972) to Apple iBook and internet/e-mail
- Move to speed of news and use of general publi supplied content
- Having been a newspaper reporter since 1967 I've seen all the changes that have happened since, including the loss of 50 per cent of my colleagues' jobs.
- Information is processed – news gets out there – much quicker than 20 years ago. It is also easier to come by with the internet.
- As a pioneering new media journalist, I have found that the more people who have become involved, the less focus there has been on the essentials - particularly quality content. The current economic situation has made this worse, staffing cuts and a unwillingness to invest in anything other than the next big thing have damaged quality online.

- Publishers have used the internet as an excuse to cut costs in ways that are commercially suicidal and culturally exceedingly damaging. Each of these factors needs a timescale. I had to learn new skills to do online work about five years ago; that source of work dried up as the organisation cut its freelance budget and reduced its output. It has far less impact now. The digital revolution is less of a factor than executive incompetence generally across many media organisations in both Europe and the US.
- I've been a journalist for 42 years, freelance for 33 of them, and this is the worst time to be a journalist in terms of making a living - freelance or staff - that I've experienced. On the ground floor internet upheaval coinciding with the financial crisis is asking every day how much of a future there is for journalism - especially print journalism - as a way of making a living (with all the attendant considerations that take "professionalism" beyond the issue of earnings, important as they are individually). "Exciting possibilities" butter no parsnips.
- I spend more time behind my desk in silence as the internet has replaced phone calls. The working atmosphere is demoralised as there is no chance of a pay rise. With people reluctant to leave their jobs and the lack of work elswhere, the once-exciting newsroom is stagnant with no new faces and little enthusiasm for the job.
- Management have become increasingly incompetent - most of my experiences stem from that one fact.
- The main one you haven't listed is the most important: there has been a huge erosion of the perceived value of journalism by its consumers, due largely to the internet, and the practice of most major news outlets of giving access to their journalism for free to web users. An entire generation has grown up to whom the idea of news in particular, but journalism in general, has a cost that needs to be paid is anathema or nonsensical. They expect news and journalism to be free at the point of delivery and have little or no conception of the costs that are entailed in providing it. As a result, it is almost impossible for small publishing businesses, and standalone freelance journalists, to continue to earn livings from journalism, because the readership has been systematically reconditioned into believing that journalism can be produced at zero cost.
- The digital revolution led to the magazine I worked for losing the majority of its advertising leading to its closure. Digital has created losts of opportunities but forced down freelance rates.
- Becoming a freelance (sole trader) was liberating.
- editorial cost slashed through non-replacement of staff. Voluntary redundancies has (sic) reduced this even further. no staff, less quality content in paper.

FRANCE

Showing 71 text responses (42%)

- Passage de la radio à la presse écrite et web, en passant par une formation d'un an en développement web.
- La chute des revenus dédiés précédemment à l'information.
- L'arrivée des réseaux sociaux, l'utilisation d'internet comme média (fils RSS, etc) sont sans doute le principal changement. J'ai été formé dans une école de journalisme il y a à peine 15 ans, et internet n'existait pas...
- j'ai fait toute ma carrière dans une grande radio internationale où j'ai tout appris, beaucoup voyagé à travers le monde.. plan de licenciement pour fusion avec France24, 360 personnes dehors qui se recyclent comme ils peuvent...
- Il n'y a aucun changement par rapport à mon premier article (j'en suis à 73 de publiés en 2 ans).
- changement de fonctions mobilité geographique
- Vie professionnelle assez récente (7 ans d'expérience), mais en tant que journaliste pigiste, je me demande comment je pourrais travailler aujourd'hui sans internet. En revanche, quand j'étais en poste (PQR), j'ai expérimenté brièvement le "fil à la patte" de la connexion permanente (carte 3G, mobile susceptible de prendre des photos) qui rend la limite extrêmement poreuse entre temps de travail et vie personnelle.
- Développement du Web, changement dans le support papier.
- aucun réel changement si ce n'est s'adapter aux différents logiciels de presse et au fait de devoir toujorus se battre pour obtenir une signature sur des articles de fonds du type reportage.
- Précarisation accrue: baisse du nombnre de jours des contrats en CDD et gel des salaires depuis 5 ans. En même temps, demande croissante de polyvalence et aptitude à travailler sur plusieurs titres mutualisés.
- La raréfaction des places: toujours plus de travail mais uniquement aux veinards qui étaient déjà en interne avant l'éclatement du début des années 2000. Les uns croulent sous le travail, les autres meurent de faim au seuil des rédaction.
- Révolution Internet, interactivité. Licenciement décembre 2010, pas beaucoup d'emploi en région.
- la précarisation du métier
- L'arrivée d'Internet a bouleversé notre façon de travaillé (plus de desk) et raccourci encore les délais (plus de pression)
- Deux LBO dans l'entreprise, une charge de la dette 2 fois supérieure à la masse salariale
- téléphone portable, internet, photo numérique
- arrivée d'internet, reactions corporatiste de certains journalsites, puis adaptation progressive - crise financiere, crise des médias, manque de rapidité d'adaptation
- Le passage d'un métier quasi artisanal ou régnait une certaine forme de compagnonage à une activité quasi industrielle et marchande.
- La main-mise des financiers et des gestionnaires sur notre entreprise (LBO). En conséquence, un appétit purement financier à court terme au détriment d'une vision industrielle à long terme de notre entreprise.
- Information travail en reseau les journalistes qui ne sont pas en line et producteurs de contenus sont out
- L'Internet et la PAO sont sans conteste les deux éléments qui ont le plus bouleversé ma vie professionnelle. L'Internet pour la recherche et les échanges. La PAO pour le circuit de copie.
- Montée en puissance de mon travail en free-lance depuis 3 ans
- L'explosion d'Internet a changé la manière d'informer. L'information va très vite, trop vite. L'informatique et le numérique nous permettent également de gagner du temps.
- Le passage à la présentation des JT qui fut un gros défi pour moi. L'acquisition d'une compétence de caméraman en plus de celle de rédacteur qui a enrichi ma carrière. La réforme de GFrance Télévisions qui a désorganisé mon entreprise.
- La crise à rebondissement de mon ancien journal, La Tribune, qui m'a interdit toute progression linéaire.
- l'arrivée de la photonumérique : plus économique, plus de souplesse dans sa gestion le développement d'internet : accessibilité des infos plus rapides mais gestion plus lourde de ce flux perpétuel. Comportement des lecteurs: moins faciles à capter, plus vesatiles et hyper sensibles aux offres d'abonnements à prix cassés (et donc moins receptifs aux offres classiques sans cadeau à la clef...)
- L'arrivée des 35h m'a permis de travailler plus. La première crise de la presse 2008 m'a fait perdre des collaborations.
- changememts technologiques et techniques
- L'internet permet de travailler à distance. La crise a fait chuter les demandes de piges dans les groupes de presse
- Je fais partie de la génération n'ayant jamais connu la sécurité de l'emploi. Depuis que je travaille j'ai du m'adapter: mobilité, flexibilité en devenant pigiste, travail précaire, salaire revu à la baisse, etc.

- La tendance à la baisse des rémunérations des journalistes oblige à travailler plus et à se spécialiser beaucoup.
- Je suis encore junior mais il y a tellement de jeunes qui veulent devenir journalistes qu'il faut être toujours plus compétents, entreprenants et efficaces pour une rémunération faible. Pour résumer : avoir les qualités d'un seniors pour le prix d'un débutant...
- Le travail à domicile s'est développé. Le prix d'une photo a complètement chuté. Les rédactions voulant faire des économies, mettent correspondant et pigistes au placard.
- Une reprise d'étude à + 40 ans,une licence création multimédia en poche, et maintenant ...l'espoir et l'envie de devenir chef de projet numérique, mais entre l'âge et le manque d'expérience dans mon dernier domaine les entreprises ne me laisse pas ma chance
- plus tard
- Avoir quitté l'enseignement pour entrer, assez tardivement, dans le monde de la communication. Travailler maintenant exclusivement de chez moi.
- illustratrice en volume pour la presse, ce métier n'existe plus car il n'est plus rémunéré. Apprendre à travailler avec les nouvelles technologies... et ne pas avoir accès à la formation professionnelle indispensable pour passer au numérique
- L'interdiction de fumer dans les locuax de travail.
- J'ai eu à gérer un plan de licenciement, j'ai travaillé en télévision, radio et presse écrite. La recherche d'infos et la vérification a été considérablement facilitée par l'Internet.
- Ma reconversion dans le journalisme deouis 2 ans ets le plus grand changement de ma vie professionnelle
- Pleine mutation pour la presse écrite qui se cherche et doit trouver sa place dans un monde "vampirisé" par le web. Pour l'instant, il ya plus de questions que de réponses et chacun tâtonne pour tenter de survivre, voire de trouver sa niche... A mes débuts, on me demandait des reportages et une analyse des événements, très vite, il a fallu gérer des réseau de correspondants, faire du secrétariat de rédaction. Puis monter les pages, et gérer les contenus Internet. Puis faire du son et de la vidéo et actuellement gérer le développement web, tout ça avec le même temps horaire !
- Le métier de journaliste se précarise énormément en France. Le statut de pigiste qui était un choix de vie devient la norme et un passage obligé pour tout jeune (et moins jeune) journaliste. Dans le secteur de la télévision et d'internet, les journalistes doivent être polyvalent (savoir filmer, monter, écrire le commentaire, poser sa voix...) et ainsi être de plus en plus capables de réaliser des reportages seuls de A à Z. Aujourd'hui, on peut dire que ces journalistes font trois ou quatre métiers à la fois, pourtant ils sont généralement moins bien payés qu'une seule personne à l'époque où les tâches étaient séparées.
- Le pssage au numérique...
- l'accès à l'information via internet et l'envoi des mail
- Au cours de ma courte (9 ans) vie professionnelle, j'ai passé par deux grands postes qui m'ont appris les techniques de base du journalisme (presse-écrite). De Secrétaire de rédaction dans un journal quotidien en langue française au poste de rédactrice en chef d'un magazine mensuel, j'ai vécu les deux extrêmes du travail journalistique: le quotidien et le mensuel. J'ai beaucoup appris lors de ma carrière dans la presse écrite et j'espère beuacoup apprendre dans les années à venir.
- numérique
- polyqualification augmentation de la production des sujets d'actualité diminution du temps pour les réaliser
- Journaliste encarté > SR en presse institutionnelle > Pigiste
- Le passage d'un travail de journaliste à plein temps en agence de presse (Reuters) à un travail de journaliste à la pige (ce qui en France est un statut de salarié)
- Une révolution technique sans aucun accompagnement, aucune formation de la part de l'entreprise.
- Le journalisme de terrain est de plus en plus mal vu (ringardisé au profit du datajournalisme sur Excel et donc du journalisme assis, moins coûteux). - La frontière entre marketing et journalisme s'amincit : on n'hésite plus à nous demander d'être présent sur les réseaux sociaux parce que : "il faut brander la marque pour générer du clic" (sic). - Faire plus, mieux en moins de temps et avec un salaire moindre. La pression est du plus en plus présente et le travail de plus en plus critiqué négativement pour accroître la pression. Dans mon cas, je suis en CDI temps partiel (à ma demande à la suite d'un burn-out) : je dois remplir les mêmes objectifs que lorsque j'étais à temps plein, mais comme je suis sur le web, je fais, en plus de mon travail de journaliste, de la programmation web, de l'analyse de statistiques de fréquentation, du graphisme et du développement sur Flash (animation et programmation Actionscript). Et la moindre erreur provoque toujours au moins une semaine de tensions... - Mais le plus gros bouleversement de ma vie de journaliste est que, si j'aime toujours profondément le métier, la façon dont on nous oblige à l'appliquer aujourd'hui me conduira sûrement à changer de métier à moyen terme. Ce n'est plus un rêve, c'est un fardeau.
- Je suis une jeune journaliste donc je suis née avec l'ère internet, j'en connais les contraintes mais aussi les avantages. Le plus difficile est de réussir à maîtriser les contraintes pour parvenir à faire du journalisme comme on le veut.

- le passage de la machine à écrire électronique à l'ordinateur (fin des années 80), l'ordinateur portable Macintosh en 1993), les recherches documentaires sur Internet et la fin de l'usage du fax pour l'envoi des artciles, le téléphone portable et depuis 2 ou 3 ans le passage à l'écriture pour les sites web avec une réflexion sur la construction de sujets multimédia qui me ramènent à l'aprentissage de techniques radio (prise de son, commentaires sur images) et TV (interviews vidéos) durant mes études mais que je n'utilisais pas jusque là en presse écrite. Ces changements s'inscrivent dans une accélération du temps et des délais en parallèle au rétrécissement de la longueur des articles. Aujourd'hui je passe mes journées devant un écran, un clavier d'ordinateur et au téléphone. Je vais beaucoup moins sur le terrain. Ce métier devient trop virtuel.
- Sur la forme, cha, Changement (voulu) d'employeur au bout de 20 ans Sur le fond changement des sources utilisées à cause ou grâce à internet
- Réduction des effectifs- Passage à la photo numérique
- Abandon missions de service public. Pas de Prxoximité. Sous traitance des émissions de production interne. Déqualification des métiers. des savoirs faire. LA comptabilité avant la télé
- le fait d'etre gere par des comptables et non plus des journalistes detruit notre metier
- internet oblige à appréhender différemment l'information que l'on produit.
- passer de salariée à Paris à Pigiste mal rénumérée . Professionnellement , L'ère de l'immédiat a bouleversé le quotidien . Trop peu de recul et d'analyse sur l'information . Manque de considération pour les pigistes .
- passage de l'analogique au numérique : un saut technologique appréciable mais qui a induit de nouvelles exigences de la part des employeurs : produire plus !
- Passionné par les nouvelles technologies
- Je suis passé d'une chaine d'info continue spécialisée à la PQR
- De moins en moins de perspectives d'évolution professionnelle et salariale / L'accélération du rythme de l'info, et son appauvrissement
- Précarisation des journalistes (10 ans avant de retrouver un CDI !), mise en compétition des pigistes (presse écrite), chute des rémunérations quand on change d'entreprise (je gagne moins qu'il y a 12 ans).
- De plus en plus de travail est demandé avec de moins en moins de moyens donnés .Des horaires élastiques très souvent modifiés au jour le jour qui perturbent beaucoup la vie familale .
- Réduction des effectifs, augmentation de la charge de travail (premium, plus web-tv, etc) à moyen constant, reportages réalisés à vue et sans préparation... dégradation grave de la qualité du rendu antenne.
- restructuration du groupe, pression psychologique, professionnelle, changement de contrat, de conditions de travail, etc.
- mon passage du journalisme en poste au journalisme à la pige, complètement lié au passage dans l'ère du multimédia: on devient multicompétents, multisupports, multimissions: multi tout!
- J'ai débuté dans un quotidien de presse écrite, puis passé dans un hebdo de presse économique, enfin créé un média web, tout en gérant un mensuel associatif. C'est riche et intéressant, rarement bien payé.
- Une précarisation croissante des conditions de production: toujours moins de moyens humains et matériels pour plus de travail, sur toujours plus de plateformes

NOTES

* Q.1 - Where do you work most? Other responses:

UK

Country/Countries	Responses
Germany	19
Spain	10
Belgium	4
Greece, Croatia, Ukraine, Italy	2 each (total 8)
Austria, Latvia, Lithuania, India, US, Switzerland, Turkey, Macedonia, Malta, Sweden, World	1 each (total 11)

FRANCE

Country/Countries	Responses
Belgium	14
Spain	2
Haiti	2
Italy	2
Netherlands, Tunisia, Angola, Australia, East Africa, Morocco, New Caledonia, Georgia, Portugal	1 each (total 9)

** Q.9 - Please identify the area you were working in prior to your move into journalism or the media.

UK

Country/Countries	Responses
Culture, arts, entertainment	17
Distribution, retail, sales	14
Science, technology, engineering, research	10
Various	8
Clerical, financial and administration	7
Librarian, libraries	6
PR, marketing, campaigns	6
Health, community work, social work	5
Architecture, design	4
Publishing, print	4
Call centre	3
Teaching	2
Military	2
Catering	2

FRANCE

Country/Countries	Responses
Animation culturelle, arts et industrie, spectacle	8
Santê, sciences humaines, collectivité locale	3
Secrétariat, administration, commerce	3
Communication, marketing, campagnes	2
Environnement	2
Restauration	1
Formation	1

*** Q.10 - Please identify how you moved into journalism or the media. Other responses:

UK/FRANCE

Individual responses have been classified as:

'Internship'/'Comme stagiaire' where normal recruitment channels - including simple application at entry level or work experience - have been identified: 31/8
'Retraining' where training, retraining or qualifications have been identified by respondents: 25/5
'Freelancing' where self-employment or volunteering have been identified by respondents: 4/5
Personal contacts: 6/0
Through union activity: 2/0

**** Q.12 - Employment status. Other responses:

UK/FRANCE
Freelance (pigiste)/employer/self-employed: 9/18
Unemployed/student/retired: 6/5
Contractor: 1 (maternity cover)/0
Intern: 1/0

Taking these figures into account, 50% of French respondents are freelance, making it the majority form of employment in France according to the survey. There is little change to the UK figures.

! Q.16 - Where do you work? Other responses:

Jobs in France are clearly more centralised but spread thinly throughout a much larger territory. The numbers of people working Germany in the UK figures (19) reflect a number of German respondents, while the figure Belgium for in the French and UK figures (18) reflect a number of Belgian respondents. While almost three times more media workers and journalists working globally or continentally answered this question on the UK form, the percentage who answered the question on the French form was higher. The French responses include 12 (44%) working in Francophone countries (dividing the Belgian responses by two) and 17 (63%) working in Europe, while the British responses include only 9 (12%) working in Anglophone countries and 48 (63%) working in Europe.

UK

(excluding the few people who identified locations in the UK and Ireland)

Germany	18
'Anywhere'	18
Spain	8
France	6
Belgium	6
US	5
Greece	2
Switzerland	2
Croatia	2
China	1
Sweden	1
India	1
Turkey	1
Italy	1
Austria	1
Malta	1
Australia	1
South Africa	1

Total (percentage) external workers 76 (13%)

FRANCE

(excluding the few people who identified locations in France)

Belgium	12
Spain	2
Italy	2
Germany	1
Tunisia	1
Haiti	1
Monaco	1
Martinique	1
Angola	1
East Africa	1
Morocco	1
Central Asia	1
New Caledonia	1
Australia	1

Total (percentage) external workers 27 (16%)

!! Q.17 - What media do you work in? Other responses:

Respondents in both UK and France identified "Training" (5 UK / 1 France), "PR, marketing and agency work" (10 / 3), and "Live events/theatre" (6 / 1) as media.

The first two of these are not, in themselves, media; the last is, but represents a small proportion of responses (1% in both countries).

Three respondents in the UK identified "Media management" (3), which probably means all media, and we have ignored these.

A number of those who responded "Other/Autre" in both countries should have opted for "TV" (8 / 2) or "Radio" (4 / 2), while in the UK respondents named jobs which should have been allocated to "Online (websites)" (8), "CD, DVD or other recording (video)" (8), "Print" (4), "Online (apps)" (1) and "Film or digital film" (1).

None of these would have affected the rankings in either country's results.

!!! Q.18 - What are your main areas of work? Other responses:

UK

Ancillary services (technical, engineering, liaison, digital archiving, research)	40
Videography etc. (includes lighting, lighting design, post-production editing, SFX)	20
Writing (includes subtitling, PR)	10
Performance or presentation (includes teaching)	10
Social media marketing (including audience research, analytics, interactive messaging)	7
Marketing and SEO (includes information architecture, live links)	5
Producing, planning or project management (includes logistics)	4
Commissioning, editing	3
Directing	1
Sound recording (includes radio)	1
Assistant, deputy (includes media operations)	1
Subediting etc.	1

FRANCE

Écriture	4
Performance ou présentation	3
Services annexes	2
Photographie	2
Vidéographie	1
Direction	1
Marketing de médias sociaux	1

UK Responses

Publisher, Editor	Actor/Film Artiste	Training	props
film production	Broadcasting	Broadcast Engineering	Vision Engineer
Research + media management in TV Library	public and media relations, market research	live links and event planning	Teaching
Human Resources	Presenting and reporting	Film/ TV, Hair, Make-up, prosthetics Designer Bafta Craft	BBC Regional Current Affairs - Deputy Editor
Camera	Legal & Business Affairs, copyright.	Engineering R&D	PR - media and campaiging
research	Media Library/Archive	Technical research and development	Training
production crew	blog. www.Atswimtwobirds.com	post production editing	RADIO
Engineering	Engineering Maintenance	IT	Digital Archivist
Props	Media planning	Customer services and Interactive Messaging.	advice to content makers
Vision Engineering/Technical Coordination	TV Broadcasting	lighting designer	Testing
Information architecture	Design (make up)	Multi skilled broadcast operator	Teaching
media relations	PR, media training	Teaching media	Subtitling
Technical Director	Production editing	Consulting and training - writing and blogging	Access services
Admin	Information management	Booking guests	costume
Journalism	training	trade union newpaper and magazine editor	Broadcast television
camera operation	Research Engineer	Engineering	TV reporting and presenting
Teaching filmmaking skills to young people	Special Effects	TV production	technical support
Web analytics support	Broadcast Engineer	At present am in the Media Operations, but things are changing around me.	Trainer of Broadcast and commercial editors
Production Research	By videography I mean camera work	Media Manager (Librarian)	Social Impact Capture in online media
Engineering	Sales of print and online space	logistics operator	RESEARCH
engineering services	Set Production	research	SFX
Camera	Transmission	Camera / Grip dept	Lighting
Lighting	Research (mixture of some above, but casting mainly)	Engineering	Broadcast engineering
Teaching	Liaising with third parties	Broadcast Engineering	Lighting
subtitling	Consumer research/Audience insight including data analysis	Vision Engineering	

FRENCH Responses

Formation	Informatique	Sous-titrage direct et semi-direct	Interview, Débat
Installation émetteur FM	correspondante de titres de la presse nationale	journaliste reporteur d'images	reportage type news
Animation d'un réseau de bénévoles en lien avec la rédaction	présentation des journaux à la radio	tournage de sujets d'actualité	production photo
journaliste reporteur d'images			

Table 13. *Full list of unclassified responses to Q.18*

!!!! Q.19 - Who is your main current employer?(Freelances should list up to three clients). Responses:

UK EMPLOYERS *(includes freelance clients) (607 responses)*

2020
360 Fashion
Aardman Animation
Absolutely Productions
Acme
Acting Out Casting
Al Jazeera
Alan Lyddiard
Alchemea
An tUltach
Andalucía Digital Multimedia
ADM
Anglo-Celt
Angry Robot
ANTENA3 TV
APTN
Archant
Archimedia Productions
ARD
Arqiva (2)
Arri Lighting
ARTE Strasbourg
Associated Newspapers
Asylum Films
Atlantic Productions
Atos IT Solutions & Services (5)
Australian Film TV & Radio School
Available Light production company
Avalon
Avanti TV
Babcock
Bath Spa University
Bayerischer Rundfunk (public radio)
BBC (138)
BBC News (3)
BBC NORTH
BBC Northern Ireland
BBC RADIO SCOTLAND
BBC Radio Stoke
BBC Resources
BBC Scotland (2)
BBC Studios and Post Production (2)
BBC Television (4)
BBC Wales (4)
Discovery
Disney
DMGT - Northcliffe
dragonfly
Duke & Earl
Dundee Rep Theatre
East Surrey College
Edinburgh International Conference Centre
Edinburgh Student
EdTurners TV
EFJ
EMI UK
Encompass Digital Media Ltd
Endemol (4)
Enterprise Ireland: Market & Tech Ireland (2)
Eon Productions Ltd/ B23 Ltd
Equality South West
ESPN
Ethos Public Relations
EurActiv
European Commission
European Men's Health Forum
Europrogrammes
Evans Woolfe Media
Ever Emotion Media group gmbh
Express Newspapers (2)
Fablemaze
FACT
Filmpool
Financial Times London
Fodor's
Footprint
Free! Magazine
Gaelsceal
GAIA
Galileu (Brazilian magazine)
Getty Images
Gill and Macmillan
Glasgow Royal concert hall
Global Editors Network
Globetrotters Club Ltd
GMB
goal.com
Goleudy
Google
GOPA
Law Society Gazette
Leeds (university alumni magazine)
Left Bank Pictures
Level 80
Liberal Democrats
Library Theatre Company
Lime Pictures
Limelight People
Link Productions
Linköping University
Lion Television
London Extra Agency
Love Productions
MacTv
Major Regional Newspaper group
Malta Film Commission
Mammoth Screen
Manchester City Council
Manchester Metropolitan University
MancunianMatters.co.uk
Manoto TV
McGraw Hill (US)
MCL
Media City Studios Ltd
Media Diversity Institute
Media Trust
MEN Media (2)
Men's Health Forum
MerseyTravel
mme - me myself and eye entertainment gmbh
Mojo magazine
Mostra
MPG Media Contacts
MTV
MUTV
N/A
N/A
NABU Berlin
National Housing Federation
National Theatre of Scotland
National Union of Journalists (4)
National Union of Journalists (Scotland)
Nautilus International
NBC
RTL
S4C
Säid Business School Oxford
Save the Children UK
Scottish Television/STV (5)
Scottish Mentoring Network
Scotzine
SDI Media UK
Self (as freelance)
Self-employed
Shed Media
Shell E&P Ireland Limited
Shine Limited
SIPTU
SIS Live (4)
Smiley Radio Properties
smileyandwest.com
SNTV
So TV
Society for Editors & Proofreaders
Society of Friends
Solicitors Journal
Somethin Else
South West TUC
Sparklab Productions
Specialist non-profit organisation
Square Peg Media
Staffordshire Newspapers Limited.
Stage, The
Stagecoach Theatre
Stow College
Styria
Sunday Business Post
Sunset & Vine
Superinteressante (Brazilian magazine)
Sweden
Taz
Technicolor
TEEU
Telegenic
TELEMADRID
Tenner Films
Terra Networks Brasil
The Casting Collective
The Crewing Company
The Guardian
The John Byrne Award
The Royal Opera House

Bill Scott - sculptor
BL Publishing / Games Workshop
Blakeway
Blogg
Bob Dela
Bolton Council
Boomerang Plus plc (2)
Brahler
Branded London
Britannia Pier Theatre
Brookfields Garden Centre
BSkyB/Sky (9)
Bulb Films Ltd
Bullseye Productions
Burge Surtees Associates Limited
Business Solent
cafebabel.com (2)
Calling the Shots
Cambridge FilmWorks
Campaigns
Capriol Films
Cartoonstock
Century Films
Channel 4 (2)
Channel 5
chinadialogue
Chiropractic Clinic
Church Times
CIA Bulgaria
Cineflix Production
cinnect culture
Company Pictures
Connect
Corporate clients
Council of Europe
Counsellor/Therapist
Creative England
Creative Exchange Derby
Crewing Company
CSC Media
Culture Magazine
Cwmni Da
Daily Mirror
DANIDA
Deutsche Presseagentur DPA
Deutschlandfunk (public radio) (2)
Dinamalar.com
Dinamo
Disability Rights UK

Grimsby Institute of Further and Higher Education
GTC
Guardian on-line
Hampshire County Council
Hampstead Films
Hand Made Media
Happy Hour Productions Ltd
Hartswood Ltd
Helios Magazine
HELLENIC BROADCASTING CORP. S.A. ERT3
Higher Education External Relations Ass.
Highflyer
Hope not Hate
Hospice
HouseMark
HTV Delhi
Ian Allen Publishing
ICIS (Reed Business Information)
ICMIF
Icon Films
I'd rather no answer
ID Transports
Ideastap
IG Bergbau Chemie Energie
IG Metall
ILDO
ILO
IMG Media Ltd. (2)
Immedia Plc
Immediate Media Co.
Ink Publishing
InPublishing
Hampshire & Isle of Wight Air Ambulance
Irish Building magazine
Irish Post
Irish Times
ITN (2)
ITN Channel 4 News
ITV (14)
ITV Breakfast
ITV Granada
Johnston Press (3)
Judge & Howard
Kings College London
KM Group
Kudos Productions

NEP Visions (2)
Neue Westfälische Zeitung
Newsquest (2)
NGOs
NIPSA trade union
None
Not currently working
Not willing to say (7)
Objective
OBS
October Films
Omnifone Ltd
Onda Azul Málaga RTVM
One & Other
Orion Media publishers of ESB staff newsletter
Oxford Film and Television
ParisBerlin
Pearson Publishing
Press Association
Press Gazette
Primate Planet Productions Ltd
Prime Focus
Princess Productions
Private sponsors/ funded: feature documentary
Public Broadcasting Service
Public Sector Connect
Public Service.co.uk Ltd
Publishing Training Centre
purefrance.com
QDOS entertainment
Quayside Media Ltd
Racecourse Technical Services Ltd
RBB Rundfunk Berlin-Brandenburg
RBI
RDF West
Red Bee Media (9)
Red Pepper
Reed
Reggio Calabria
Register NV
Reuters
Rhondda Cynon Taff County Borough Council
Ricochet TV
RMT
Rolls Royce
Roundhouse
RSC
RTÉ (2)

Tindle Newspapers (2)
Trafford Council
Trinity Mirror (inc MEN Media) (2)
TSPL
TTNET
TUC
TudnoTV
Tudor Rose Holdings
TWI
U.COM
UEFA
Understanding Animal Research
Unions
Unison (3)
Unite the Union (2)
Universal Extras
Universe Media Group
University of Bradford
University of Leeds
University of Salford
University of the West of England
Various (4)
Various Charities
Various film production companies
Various small production companies
Various tv production companies
Village
Virgin media
VNU
Voluntary sector
VSO
WAN IFRA
WDR
Whitenoise Productions
Wideaware
Wild Dream Films
Wired-GOV
World Vision UK
WPP (doing journalism-related work outside TV)
www.discowercalabria.eu
www.union-news.co.uk
Yeditepe University
Yorkshire Evening Post
Zaba Communications Ltd
Zahra Publications

FRANCE EMPLOYERS *(includes freelance clients) (184 responses)*

20 Minutes	EurActiv.com PLC	Le quotidien "Le Soir"	Reed Business Information
60 millions de consommateurs	Europe 1	Le quotidien du tourisme	Régie Arm
Académie du Rhône	Faire Face (l'Association des Paralysés de France)	Le trégor	Relaxnews
Actualités sociales hebdomadaires (WKF)	Fédération nationale de la Mutualité Française	L'Echo (Groupe Mediafin)	RR
Actuel Avocat	FGVB	Les Echos	Radio Télévision Belge Francophone RTBF
Afrique Magazine	Figaro	L'Humanité	RTL Belgium
Agence 154	Fondation EurActiv PoliTech	Libération	RTL France
Agence A touts Presse Senior	France 24 (3)	Ma(g)ville	RTL2
Agence France Presse (2)	France 3 Auvergne	Magazine FAMILIA	RUSTICA
AMF (Maires de France)	France Télévisions (11)	Magazine Plein Ouest	Sante et travail
Amina	France Télévisions France 3 (4)	Magazine Racines (société d'édition Inf'agri 85) (2)	SEPL
Association des paralysés de France (APF)	GER Roularta	maison.com	Setac (Journal des Maires)
Associations	Groupe Indigo - La Lettre A	Maisons de productions	SFMag
Auto-Journal (Groupe Mondadori)	Groupe Moniteur	MCO Médias	Slate.fr
Auto-Plus (Groupe Mondadori)	Groupe Moniteur / La Gazette des communes	MEDI 1 MAROC	SOINS - Elsevier
Bulletin de l'Industrie Petroliere	Groupe Moniteur / www.emploipublic.fr	Mensuel Aquò d'Aquí	Solutions Presse
Canal Sport	Groupe Moniteur / www.lagazette.fr	Mondadori Magazines France	Sud Infos
Caradisiac	Hit West (2)	Moto Journal	Sud Ouest
Ce ne sont pas des clients mais des employeurs	Journal du Textile	MyEurop	SudPresse
Centre Presse Aveyron	La Dépêche du Midi (Toulouse)	Nantes Actu	TDF (2)
Cesavo (centro di servizi per il volontariato)	La Lettre Sud Infos	Nice-Matin	Télé 7 Jours
Chips Interactive	La Martinière	Nord Éclair	Télénantes
Club de la presse Languedoc-Roussillon	La République des Pyrénées	Notélé	Territorial
Collectifs	LA VOIX DU NORD	NRJ GROUP	Tipiti.biz
Collectivites	LCI	Ouest-France (3)	Top Santé (uniquement deux piges à ce jour)
Conseiller général de camarè - aveyron	Le Canard Social	Picardie la gazette (client)	Trends-Tendances (Roularta Media Group)
Crepin leblond	Le Courrier de l'Ouest	Pôle Emploi	TV Vendée (SAEM Vendée Images)
Défi Givordin	Le Journal de Mickey	Prima	Victoires Editions
Direction(s) (Reed business)	Le Journal du Dimanche	Prisma Presse	Ville de Rennes
Doctissimo	Le Monde (2)	Profession Avocat (WKF)	WEEKY
Écologie et Progrès	Le Moniteur	Publihebdos	WKF
Econostrum.info	Le Nouvel Economiste	Que Tal Paris	Wolters Kluwer (4)
Editions La Vie du Rail	Le Parisien Economie	Radio France	World Trades Publishing
Élephant & Compagnie	Le Point	Radio France Internationale (9)	www.courleuxsansfrontieres.com
ESJ	Le Porte-Plumes	Radio Méditerranée Internationale (Médi1)	YOUPI

Q.20 - Please identify the size of your employer's enterprise. (If you are a freelance, a casual or a contractor, please answer the question for your main client or for the enterprise you are currently, or were most recently, contracted to.)

OTHER RESPONSES:

	UK	FRANCE
Micro-business (1-10 employees)?	0	
Small private-sector business (11-100 employees)?	0	
Small-to-medium-sized private-sector enterprise (101-500 employees)?	4	
Large private-sector enterprise (501+ employees)?	3	2
Small public-sector business (11-100 employees)?	0	
Small-to-medium-sized public-sector enterprise (101-500 employees)?	7 (NGO)	2 (parapublic/asociation)
Large public-sector enterprise (501+ employees)?	5 (BBC)	

Q.23 - Which union do you belong to for negotiating purposes? Other responses:

UK

DJU/Ver.di (Germany)	8
CC.OO (Spain)	5
UCU (UK)	2
NUJ (UK)	3
ESIEA (Greece)	1
UGT (Spain)	1
FAPE (Spain)	1
TUCJ (Croatia)	1
Convention Française de Journalistes (France)	1
AGJPB (Belgium)	1
BECTU (UK - retired)	1
Unite (UK)	1
Foreign Press Association (FPA) (UK)	1
ESIEMTH (Greece)	1
GMB (UK)	1

FRANCE

NUJ (UK) (Belgium-based) *	1
CGT TDF (France)	1
None	1
AFD (France)	1
SNJT (Tunisia)	1
AJP (Belgium) *	1
FNSI (Italy)	1

** The same individual entered both of these*

UNION MEMBERS

Q.25 - Why did you join your union? Other responses:

A number of UK respondents identified specific benefits of union membership as reasons for joining. The particular benefits mentioned were:

- insurance (12)
- access to a press card (3)
- training (2)
- legal support (2)

We have allocated the first three to the "To improve my earnings or working conditions" option (17). Legal support was already included in the option "I needed representation or legal advice".

Six people saw union membership as a form of insurance itself, and two mentioned defence of their working conditions or pension. We have added these to the "Defend my job" option in the table (8).

Two people identified "helping others" as their motivation. We have counted these along with the four people who mentioned the importance of "community" and mutual support under "believing in the aims of trade unions" (6).

Three people said joining a union was expected of them for one reason or another, and another three said there were more powerful pressures to join such as the demands of a closed shop. We have allocated these to the "I was persuaded..." (3) and "It was compulsory..." (3) options.

Only one person mentioned networking (1).

Two *French* respondents, by contrast, mentioned employment law and the "Plan Sauvegarde de l'Emploi", while one mentioned "defending the profession" and another said that it would be stupid not to, given the behaviour of employers.

We have allocated all of these to the "I believed in the aims of trade unions" (4).

Q.27 - If you have received training, who provided it?Union members. Other responses:

None of the respondents who replied "Other/Autre" seemed to understand that we were asking who had financed or organised training for them. The answers may be more relevant to the subsequent question regarding delivery. A significant number of respondents mentioned government authorised or appointed agencies for skills development in the media, such as Skillset in the *UK* and the OPCA organisations, Mediafor and Afdas, in *France*. Universities or institutes and journalism schools were also mentioned. In all cases, funding and organisation has been predominantly the responsibility of employers or the respondents themselves (particulalry in the case of freelances), often with support from the EU or the training agencies. The situation in *France* is more formalised than in the *UK*, where continuing professional development is less well organised.

Q.27 - If you have received training, who provided it?Union members. Other responses:

UK responses identified specialist training premises (54), online or distance learning (14), employer's premises (12), university/college (6) and union premises (5). Delivery at specialist training premises would represent 17% of the training if we had included it as a specific option. *French* respondents identified 5 specialist training premises and 1 university. Delivery at specialist training premises would represent 13% of the training if we had included it as a specific option.

NON-UNION MEMBERS

Q.25 - Why did you join your union? Other responses:

	UK	FRANCE	TOTAL
Unions irrelevant/unhelpful to freelances	6 (14%)	1 (2%)	7 (5%)
Cost of union dues	3 (7%)	2 (5%)	5 (4%)
Not in the country	2 (5%)	3 (7%)	5 (4%)
Job not covered (eg. working in radio or as a reporter)	2 (5%)	2 (5%)	4 (3%)
Not enough time	0 (0%)	4 (9%)	4 (3%)
Unions ineffective or unrecognised	3 (7%)	1 (2%)	4 (3%)
Cost of arrears	3 (7%)	0 (0%)	3 (2%)
Overlooked due to neglect	0 (0%)	3 (7%)	3 (2%)
I am a boss	1 (2%)	1 (2%)	2 (2%)
Object to unions ('bad attitude/undeserving members')	0 (0%)	2 (5%)	2 (2%)
Object to unions ('too political')	1 (2%)	0 (0%)	1 (1%)
Total	21 (25%)	19 (43%)	40 (31%)

We have considered reasons, not respondents, in the table - hence the disparity with the figures above. The most important reasons in this list are irrelevance to freelances (*UK*) and lack of time (*France*). Cost was clearly an important consideration for *UK* respondents, while neglectfulness was important in *France*.

*!!! Q.32 - If you have received training, who provided it? (Non-union members). Other responses:

French respondents identified a small number of 'providers' - one independent journalism trainer (1), a 'workshop' (1), a university (1) and web sites (2) and press clubs (2). In the UK, twp respondents identified college or university (2).

$ Q.33 - If you have received training, how was it delivered? (Non-union members). Other responses:

Three French respondents identified press clubs (3), one a university (1), one local school (1), and one through the internet (1). One responded 'in Prague' and one, simply, 'ville' (1). UK respondents mentioned university (2) and a training centre (1).

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